On-line Outage Request Form
A Step-by-Step Guide

IESO Training

May 2014

Power to Ontario.
On Demand.

On-line Outage Request Form:

A Step-by-Step Guide

AN IESO TRAINING PUBLICATION

This guide has been prepared to assist in IESO training and has been compiled from extracts from the market rules or documents posted on the web site of Ontario's Independent Electricity System Operator. Users of this guide are reminded that they remain responsible for complying with all of their obligations under the market rules and associated policies, standards and procedures relating to the subject matter of this guide, even if such obligations are not specifically referred to herein. While every effort has been made to ensure the provisions of this guide are accurate and up to date, users must be aware that the specific provisions of the market rules or particular document shall govern.

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Toronto, Ontario
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1. Introduction

This guide explains how to enter, view, revise and cancel an Outage Request online through the IESO Portal.

The On-line Outage Request Form is available through the IESO Portal Outage Management community. (A Portal community page is a web page where users with similar interests can access applications, use related links, and get information.)

For more information on the IESO Portal, please refer to the *Guide to the IESO Portal*, available on our Training web pages.

For detailed information on Outage Management, including timelines and the equipment outages that must be reported, please refer to Market Manual 7.3 Outage Management and the Market Rules, Chapter 5, Section 6. Your company's specific outage reporting requirements were detailed in the Outage Reporting letter sent to you by the IESO.

If you have any questions as you follow this guide, please contact IESO Customer Relations:

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2. Required Internet Explorer Setting

IESO Portal has specific technical requirements. Please see IESO Technical Interfaces page for more information about systems, including supported client platform information.

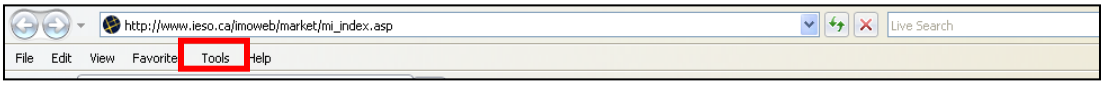
The On-line Outage Request Form also requires specific Microsoft Internet Explorer settings in order to function properly. You may wish to contact your IT department before making any changes.

The On-line Outage Request Form has the following requirements:

- Screen resolution of 1024 X 768 or higher
- Microsoft Internet Explorer version 7.0
- Microsoft Internet Explorer native XMLHTTP enabled
- The URL https://portalapps.ieso.ca is added as a Trusted Site
- The security level for Trusted Sites is set to medium or lower
- Microsoft Internet Explorer pop-up blocker disabled

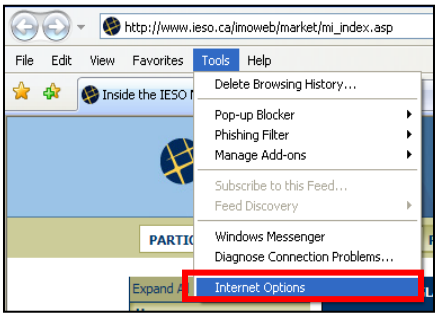
Step One

In Microsoft Internet Explorer, click **Tools.**



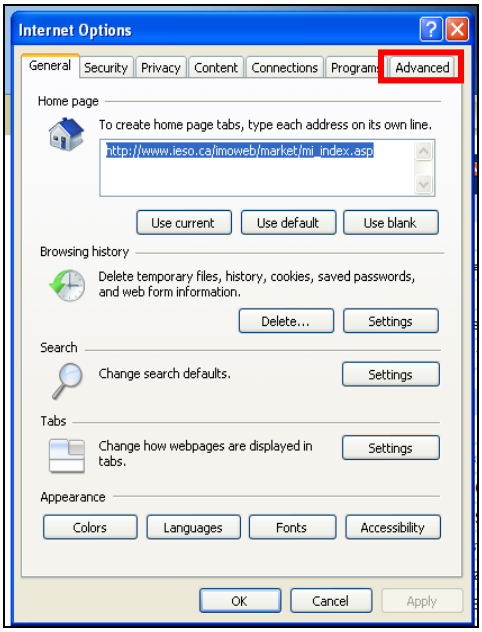
Step Two

Click **Internet Options.**



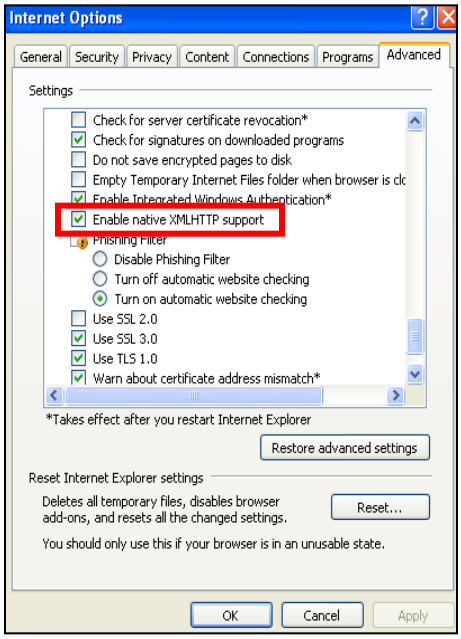
Step Three

Click the **Advanced** tab in the pop-up.



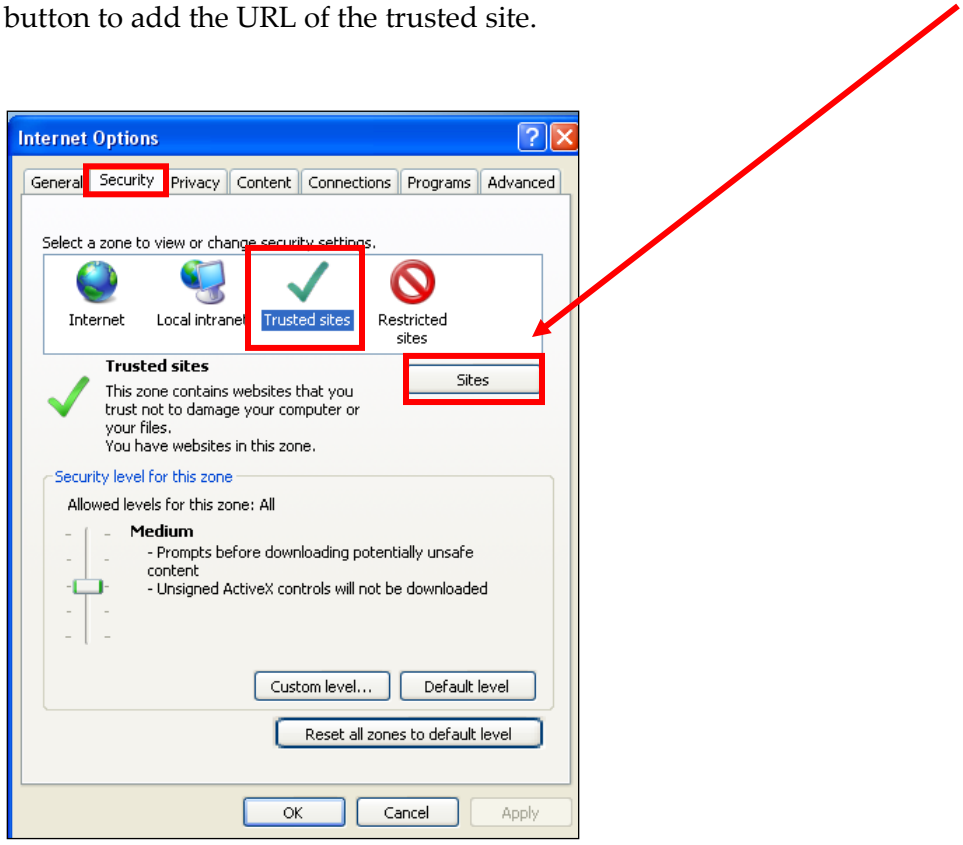
Step Four

Ensure that **Enable native XMLHTTP support** has been selected.

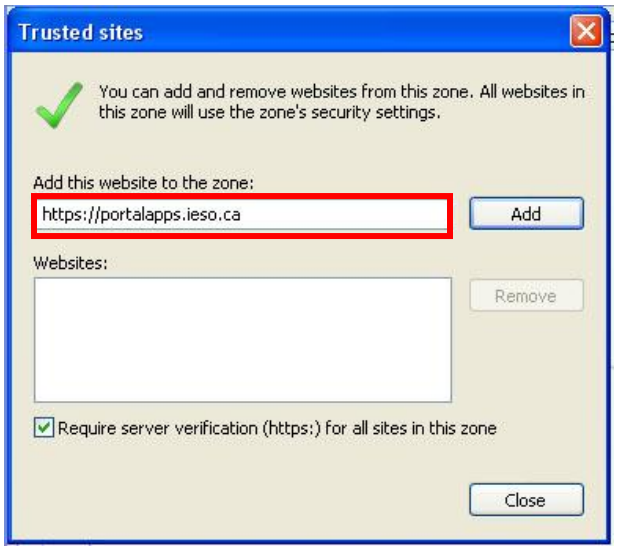


Step Five

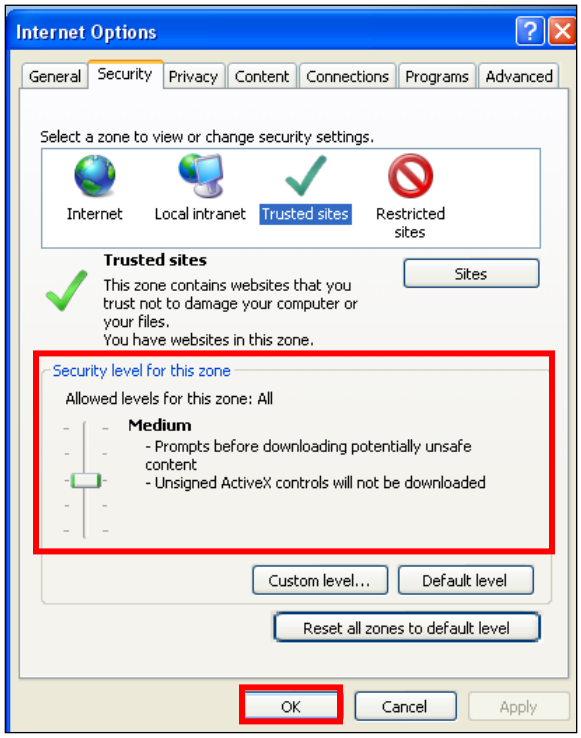
Click on the **Security** tab**.** Click once on **Trusted sites**, then click on the **Sites** button to add the URL of the trusted site.



After you click on **Sites**, a pop-up window will appear. Type in the URL **https://portalapps.ieso.ca** and click **Add**. Click **Close** to return to the **Security** tab.


Trusted sites
You can add and remove websites from this zone. All websites in this zone will use the zone's security settings.
Add this website to the zone:
https://portalapps.ieso.ca
Add
Websites:
Remove
Require server verification (https:) for all sites in this zone
Close

Click on the slider tool to adjust the security level for this zone to **Medium** (or lower).



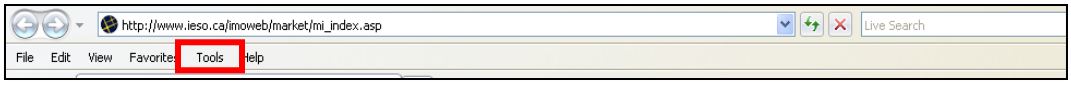
Click **OK**.

Step Six

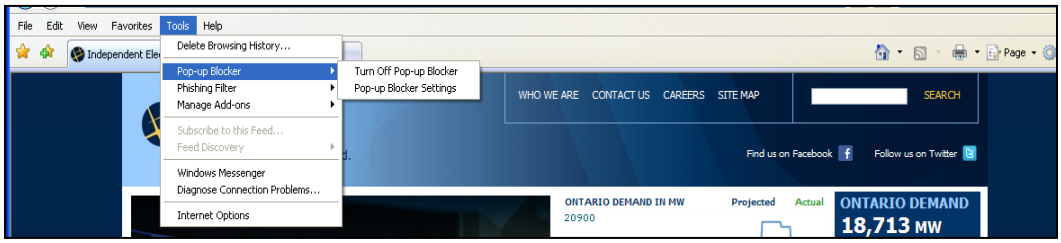
There are several ways to turn off Pop-Up Blocker in Internet Explorer. Instructions for customizing the security level of your Pop-Up Blocker are available on the On-line Outage Request Form portal page.

The following procedure turns off the Pop-Up Blocker for all sites:

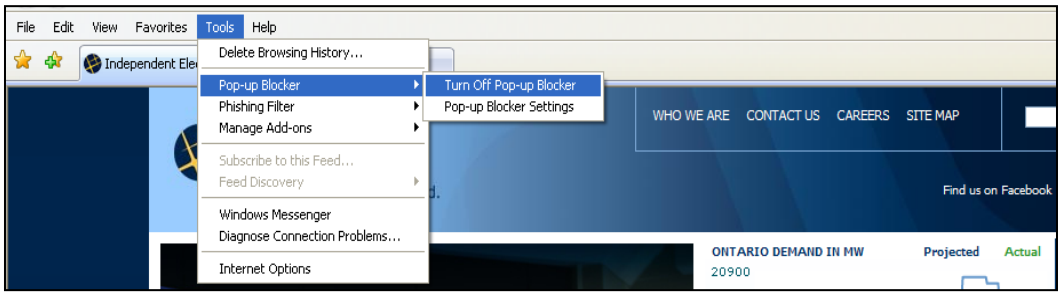
Disable the pop-up blocker by clicking on the **Tools** menu:



Select **Pop-up Blocker**.



Click on **Turn Off Pop-up Blocker**.



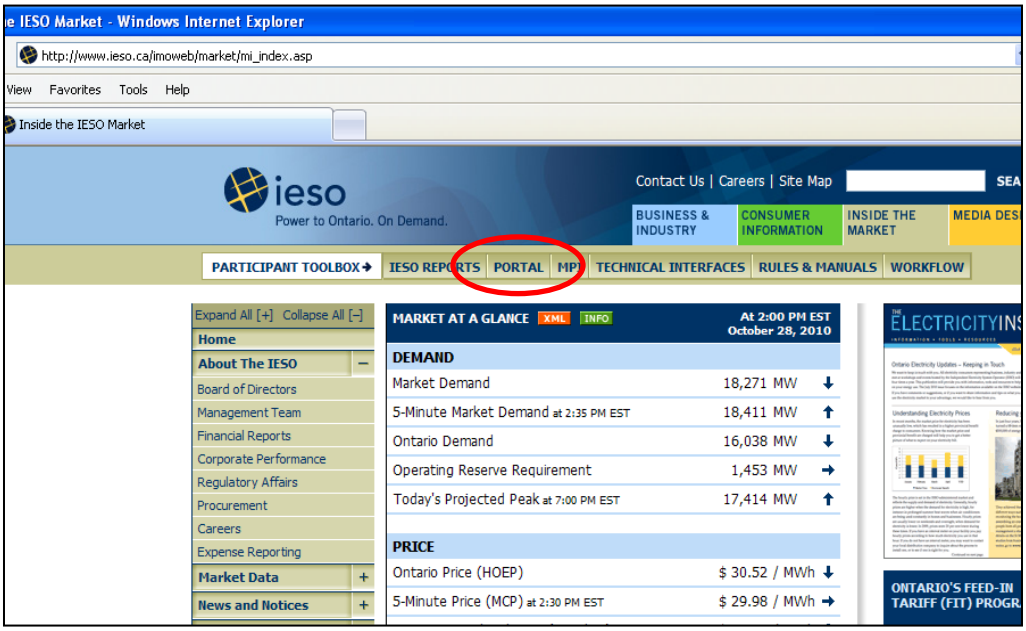
Continue to Section 3, '**Logging in to the Outage Management Community**'.

3. Logging In to the Outage Management Community

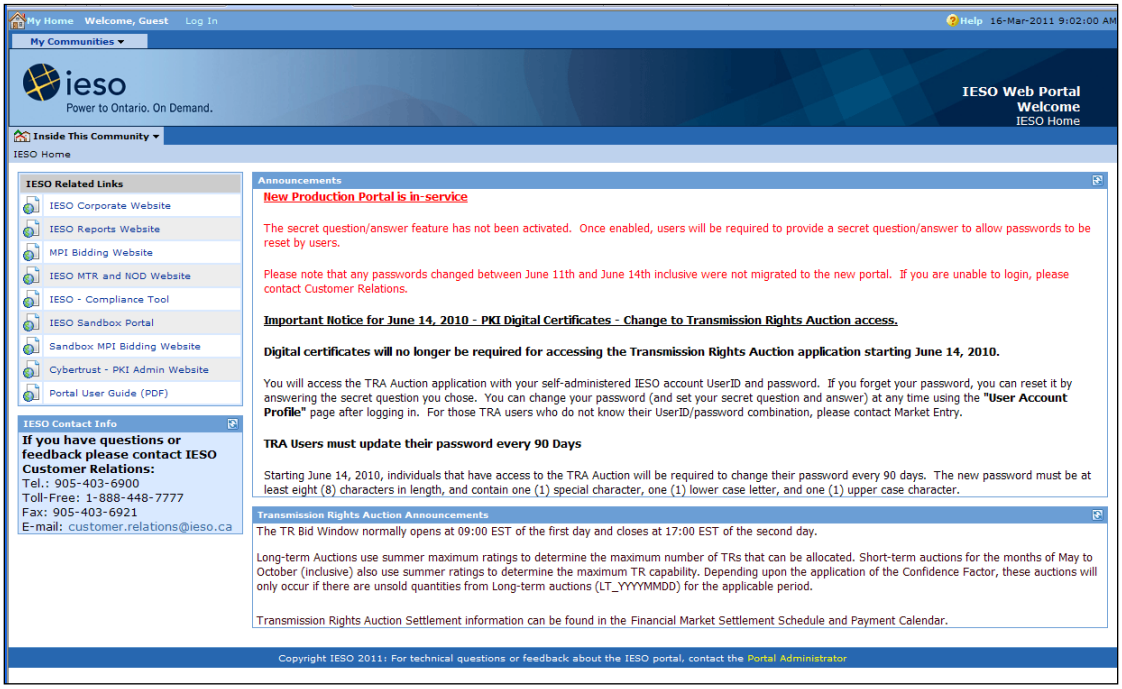
Step One

Go to the **Inside the Market** page on www.ieso.ca.http://www.ieso.ca/imoweb/market/mi_index.asp.

To log in to the Portal, click on **Portal** in the **Participant Toolbox** bar. See the **Guide to the IESO Portal** for more information:



You will be directed to the **IESO Web Portal: Welcome** page.


My Home
Welcome, Guest
Log In
Help
16-Mar-2011 9:02:00 AM
My Communities
ieso
Power to Ontario. On Demand.
IESO Web Portal
Welcome
IESO Home
Inside This Community
IESO Home
IESO Related Links
IESO Corporate Website
IESO Reports Website
MPI Bidding Website
IESO MTR and NOD Website
IESO - Compliance Tool
IESO Sandbox Portal
Sandbox MPI Bidding Website
Cybertrust - PKI Admin Website
Portal User Guide (PDF)
IESO Contact Info
If you have questions or feedback please contact IESO Customer Relations:
Tel.: 905-403-6900
Toll-Free: 1-888-448-7777
Fax: 905-403-6921
E-mail: customer.relations@ieso.ca
Announcements
New Production Portal is in-service
The secret question/answer feature has not been activated. Once enabled, users will be required to provide a secret question/answer to allow passwords to be reset by users.
Please note that any passwords changed between June 11th and June 14th inclusive were not migrated to the new portal. If you are unable to login, please contact Customer Relations.
Important Notice for June 14, 2010 - PKI Digital Certificates - Change to Transmission Rights Auction access.
Digital certificates will no longer be required for accessing the Transmission Rights Auction application starting June 14, 2010.
You will access the TRA Auction application with your self-administered IESO account UserID and password. If you forget your password, you can reset it by answering the secret question you chose. You can change your password (and set your secret question and answer) at any time using the "User Account Profile" page after logging in. For those TRA users who do not know their UserID/password combination, please contact Market Entry.
TRA Users must update their password every 90 Days
Starting June 14, 2010, individuals that have access to the TRA Auction will be required to change their password every 90 days. The new password must be at least eight (8) characters in length, and contain one (1) special character, one (1) lower case letter, and one (1) upper case character.
Transmission Rights Auction Announcements
The TR Bid Window normally opens at 09:00 EST of the first day and closes at 17:00 EST of the second day.
Long-term Auctions use summer maximum ratings to determine the maximum number of TRs that can be allocated. Short-term auctions for the months of May to October (inclusive) also use summer ratings to determine the maximum TR capability. Depending upon the application of the Confidence Factor, these auctions will only occur if there are unsold quantities from Long-term auctions (LT_YYYYMMDD) for the applicable period.
Transmission Rights Auction Settlement information can be found in the Financial Market Settlement Schedule and Payment Calendar.
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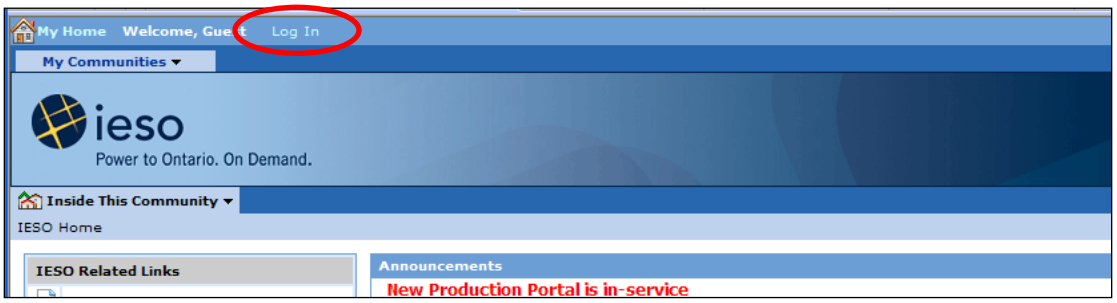
Click on **Log In** at the top of the page:



You will be directed to the **Log In** page.

Enter your IESO Account **User ID** and **Password**. If you do not have a password or cannot log in, contact IESO Customer Relations:

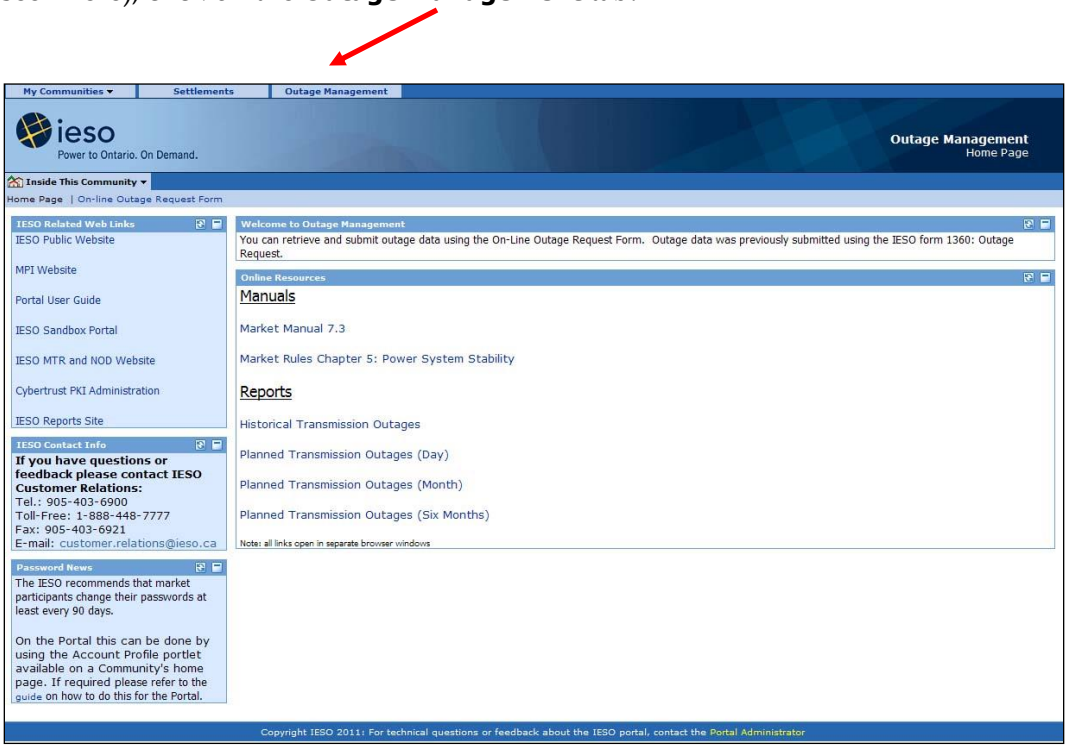
Tel: (905) 403-6900
Toll Free: 1-888-448-7777
Fax: (905) 403-6921
customer.relations@ieso.ca

Return to IESO Portal Welcome Page
ieso
Power to Ontario. On Demand.
Log In
Log in with User ID and Password
User ID
username
Remember my user ID
Password
Login
Important Note:
When you are logging in for the first time, you should choose a secret question and answer to enable you to reset your password if you forget it. After logging in, click on the User Account Profile tab to access your account and enter the secret question and answer.
Attention to Market Participants accessing the Transmission Rights Auction: This portal is owned and operated by the IESO, and all use of this portal is governed by the IESO's market rules. As a registered Market Participant, you have received a unique and confidential user ID and password from the IESO to access this portal and you agree to maintain their confidentiality by sharing them with only your authorized representative(s). You specifically agree that you are exclusively responsible for all access to and any activity on this portal that occurs through the use of your user ID and password. If you become aware of any unauthorized use of your user ID or password, you agree to immediately notify the IESO. The IESO is not liable for any loss or damage arising from any unauthorized access or use of your user ID and password. If you do not agree with these terms and conditions, do not login to this portal and immediately advise the IESO.
Log In Tips
Forgot User ID?
Forgot User ID/Password?
Not a registered user?
For Assistance:
Contact IESO Customer Relations
Tel: 905-403-6900
Toll-Free: 1-888-448-7777
Fax: 905-403-6921
E-mail: customer.relations@ieso.ca
Copyright IESO 2010: Contact the IESO Portal Administrator for technical questions or feedback.

Step Two

Once you have successfully logged in to the Portal, the **IESO Web Portal Welcome** community page appears, with tab buttons for all of the communities you have been granted access to. The **Online Outage Request Form** tool is available through the **Outage Management** community.

If you are not automatically directed to the **Outage Management Home Page** (as seen here), click on the **Outage Management** tab.


My Communities
Settlements
Outage Management
ieso
Power to Ontario. On Demand.
Outage Management
Home Page
Inside This Community
Home Page | On-line Outage Request Form
IESO Related Web Links
IESO Public Website
MPI Website
Portal User Guide
IESO Sandbox Portal
IESO MTR and NOD Website
Cybertrust PKI Administration
IESO Reports Site
IESO Contact Info
If you have questions or feedback please contact IESO Customer Relations:
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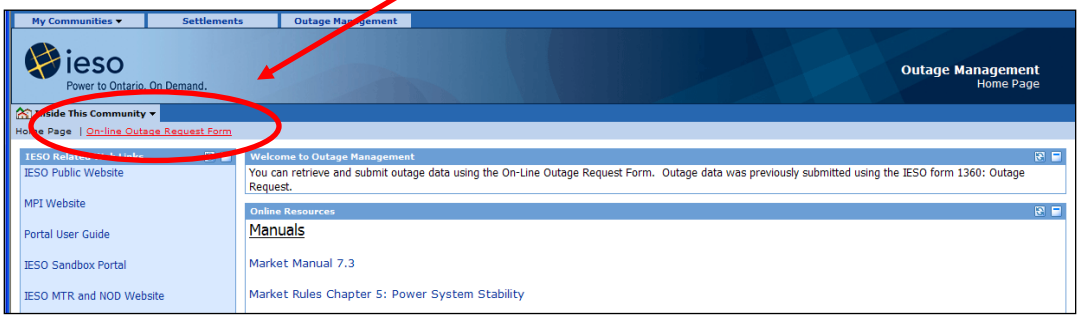
Toll-Free: 1-888-448-7777
Fax: 905-403-6921
E-mail: customer.relations@ieso.ca
Password News
The IESO recommends that market participants change their passwords at least every 90 days.
On the Portal this can be done by using the Account Profile portlet available on a Community's home page. If required please refer to the guide on how to do this for the Portal.
Welcome to Outage Management
You can retrieve and submit outage data using the On-Line Outage Request Form. Outage data was previously submitted using the IESO form 1360: Outage Request.
Online Resources
Manuals
Market Manual 7.3
Market Rules Chapter 5: Power System Stability
Reports
Historical Transmission Outages
Planned Transmission Outages (Day)
Planned Transmission Outages (Month)
Planned Transmission Outages (Six Months)
Note: all links open in separate browser windows
Copyright IESO 2011: For technical questions or feedback about the IESO portal, contact the Portal Administrator

Click on the link to the **On-line Outage Request Form**:


My Communities
Settlements
ieso
Power to Ontario. On Demand.
Outage Management
Home Page
Inside This Community
On-line Outage Request Form
IESO Public Website
MPI Website
Portal User Guide
IESO Sandbox Portal
IESO MTR and NOD Website
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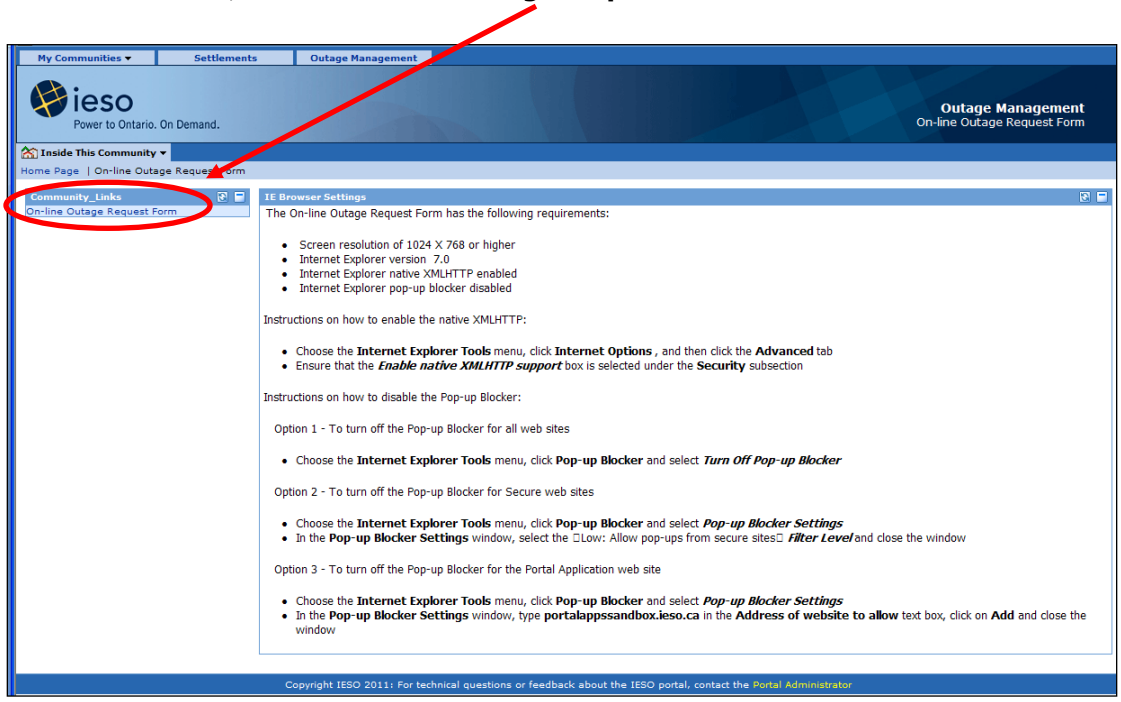
Online Resources
Manuals
Market Manual 7.3
Market Rules Chapter 5: Power System Stability

This will take you to the **On-line Outage Request Form** page which includes instructions and reminders about system settings required to use the On-line Outage Request Form tool.

To access the tool, click on **On-line Outage Request Form.**


My Communities
Settlements
Outage Management
ieso
Power to Ontario. On Demand.
Outage Management
On-line Outage Request Form
Inside This Community
Home Page | On-line Outage Request Form
Community_Links
On-line Outage Request Form
IE Browser Settings
The On-line Outage Request Form has the following requirements:
Screen resolution of 1024 X 768 or higher
Internet Explorer version 7.0
Internet Explorer native XMLHTTP enabled
Internet Explorer pop-up blocker disabled
Instructions on how to enable the native XMLHTTP:
Choose the Internet Explorer Tools menu, click Internet Options , and then click the Advanced tab
Ensure that the Enable native XMLHTTP support box is selected under the Security subsection
Instructions on how to disable the Pop-up Blocker:
Option 1 - To turn off the Pop-up Blocker for all web sites
Choose the Internet Explorer Tools menu, click Pop-up Blocker and select Turn Off Pop-up Blocker
Option 2 - To turn off the Pop-up Blocker for Secure web sites
Choose the Internet Explorer Tools menu, click Pop-up Blocker and select Pop-up Blocker Settings
In the Pop-up Blocker Settings window, select the Low: Allow pop-ups from secure sites Filter Level and close the window
Option 3 - To turn off the Pop-up Blocker for the Portal Application web site
Choose the Internet Explorer Tools menu, click Pop-up Blocker and select Pop-up Blocker Settings
In the Pop-up Blocker Settings window, type portalappssandbox.ieso.ca in the Address of website to allow text box, click on Add and close the window
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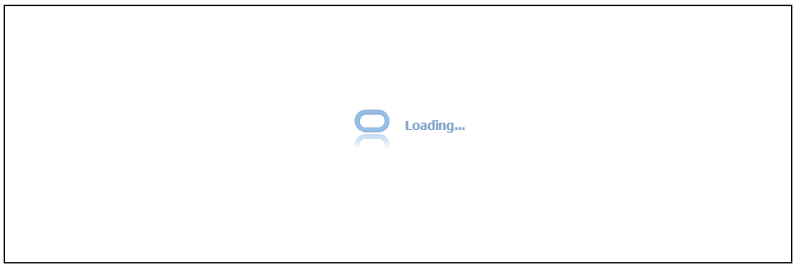
The **Loading** icon will appear while your outage information is being retrieved:



4. Submitting an Outage Request via the 'New Request' Button

This page allows you to select the organization for which you wish to enter, revise, view or cancel an outage. You will see a list of the organizations for which you are authorized to manage outage requests. If you are only authorized for one organization, you will only see that organization in your list.

This page also shows you what level of access you have for the organization:

- **Write** access allows you to enter, revise and view submitted or draft outages.
- **Read** access allows you to view submitted or draft outages but not enter or revise outages.

With either type of access, you can:

- Search for submitted outage requests by selecting Search Submitted
- Search for outages that have so far been entered only in draft form by selecting Search Drafts

With Write access, you can:

- Create a new outage request by selecting New Request
- Create a new draft outage request be selecting New Draft

There are two different ways to begin to enter an outage using the **On-line Outage Request Form** tool:

1. If you are ready to create or submit a complete Outage request to the IESO, click New Request to complete a form. After you have completed the entry of your information, the tool will require you to submit the request.

2. If you do not yet have all of your information but would like to begin entering an outage, click New Draft to start a form. Here, you will be able to enter and save information to the Outage database without submitting the form to the IESO. Once the Outage Request is complete, it can be submitted to the IESO through the Search Drafts function.

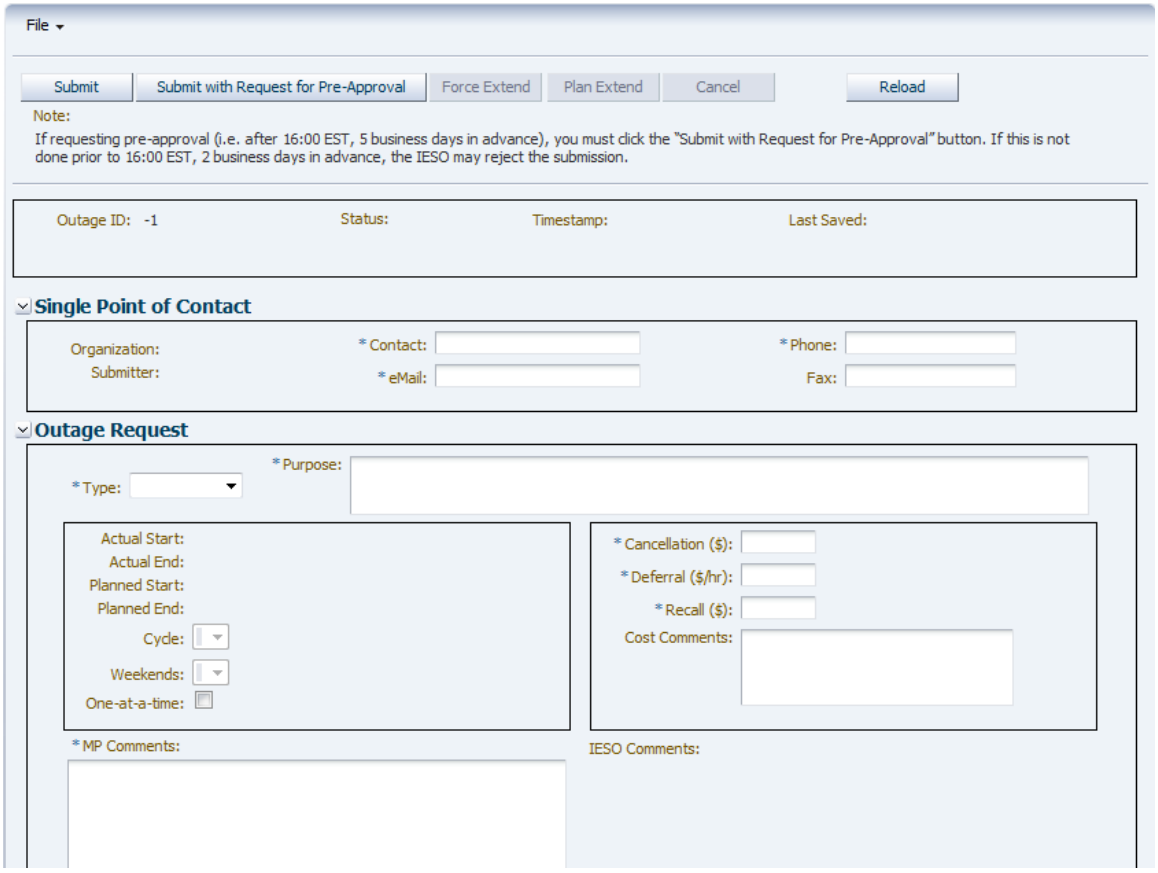
NOTE: This section explains the process if you click the New Request button. Section 5, '**Submitting an Outage Request via the 'New Draft' Button',** explains the process to follow when you select New Draft.

Step One

Click the New Request button.

Step Two

You will be taken to the **Online Outage Request Form: Edit Submitted Outage** page. This is where you can enter your new outage request. Fields with an asterisk (*) are mandatory

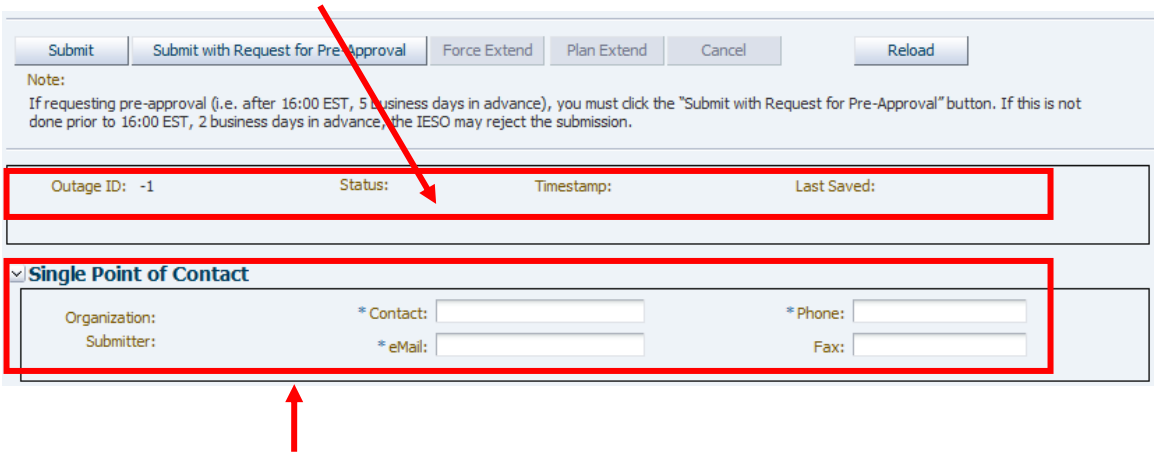


Completing the Form

Here are a few tips about the different sections of this form:

Status and Single Point of Contact Sections

This section will be blank because this is a new outage request. It is not populated until the request has been submitted.

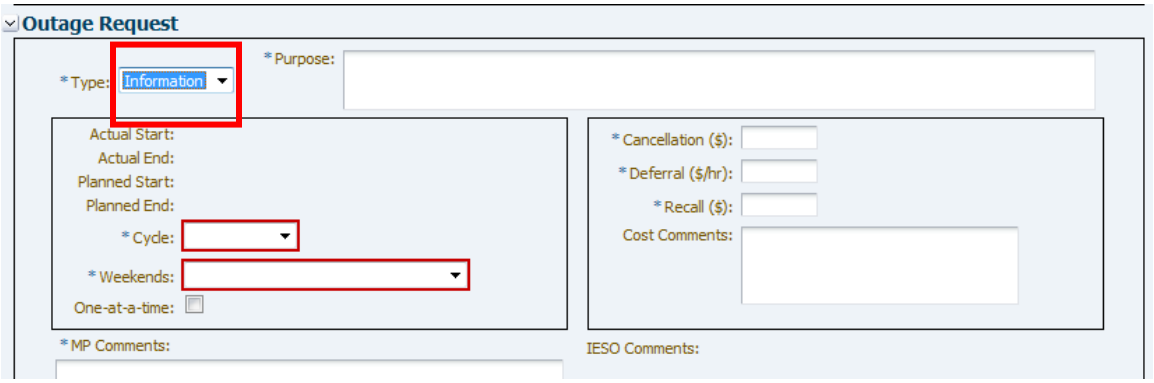


When using the **Search Submitted** feature to create a new outage, most fields are mandatory (marked with an asterisk *). In the **Single Point of Contact** section, enter the contact information for the person the IESO should interact with about the outage. To help you complete this section, when you click in each box the format required to enter this data will be shown.

Outage Request Section

The **Outage Request** section is where you provide some basic information about the outage.

Type: Select from **Planned, Forced, Test**, or **Information**. Depending on which **Type** you select, different choices will be made available on the remainder of the form.



- **Planned**: A planned, intentional outage or derate submitted to the IESO with adequate advance notice
- **Forced**: An outage or derate taken to prevent damage or to protect the public or the environment. Forced outages may result from the automatic removal of equipment from service, manual removal of equipment from service without advance planning, or may be subject to advance planning if the forced outage has time-limited flexibility (urgent outages).
- **Test**: Required for an abnormal condition or configuration
- **Information**: Other; e.g. planned shutdown, demand control actions

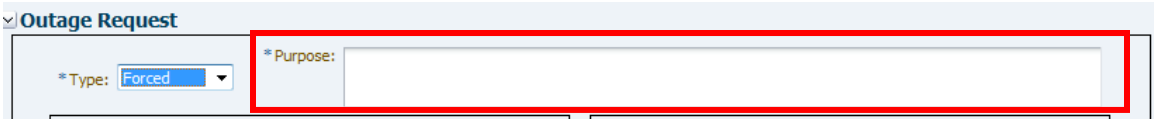
NOTE: If entering an outage or derate for a Wind or Solar facility, any changes in overall facility capacity must be applied to the aggregate resource. Two examples:

- Assume that your wind facility is made up of one hundred 1 megawatt turbines. Fifty turbines feed radially into one breaker, while the other fifty turbines feed radially into another breaker. If you plan to take one of these breakers out of service, you would have to derate your aggregate resource by 50 MW.

- Assume you want to take your facility's grid connected step-up transformers out of service for maintenance. This makes your facility completely unable to generate for the duration of the outage. In this situation, you are required to submit an outage to your aggregate resource in addition to the one submitted for your step-up transformers.

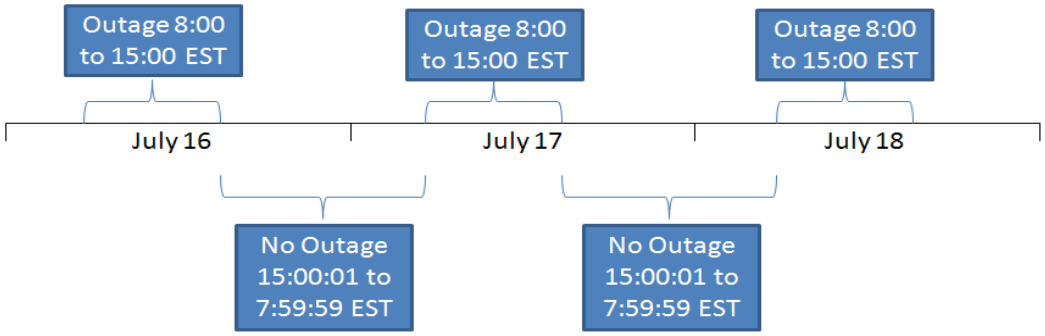
See the **Equipment Condition Plan (ECP)** Section below for information on submitting an outage or derate.

Purpose: Explain why you are taking this outage.



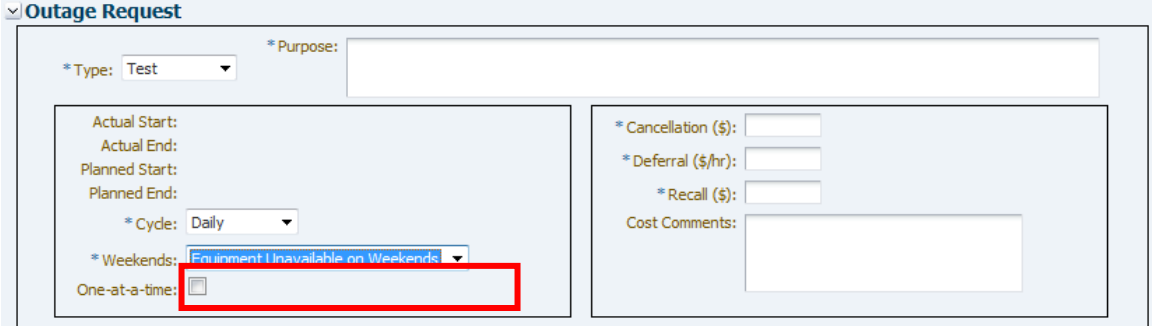
Cycle: If you selected anything but **Forced** under **Type**, you must choose either **Daily** or **Continuous** by clicking the pull-down.

Daily means the outage will occur during set times over one or more days. For example, assume you have an outage that requires work to be done between 08:00 and 15:00 EST each day from Wednesday, July 16 to Friday, July 18. During the times in between, however, the equipment will be available for use. In this example, the **Planned Start** would be entered as "July 16, 2014 08:00" and the **Planned End** would be entered as "July 18, 2014 15:00" (see page 20). Specifying **Daily** in this example tells the IESO that your equipment will be unavailable between 8:00 and 15:00 EST each day of the outage, but available again starting at 15:00 ending when the next day's work begins at 08:00. This schedule will repeat daily from July 16th until the outage ends on July 18th.

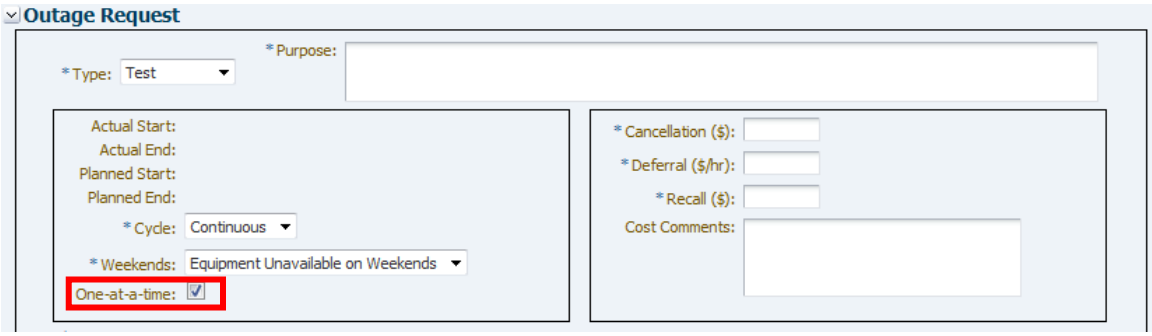

Outage 8:00 to 15:00 EST
Outage 8:00 to 15:00 EST
Outage 8:00 to 15:00 EST
July 16
July 17
July 18
No Outage 15:00:01 to 7:59:59 EST
No Outage 15:00:01 to 7:59:59 EST

Continuous means an equipment outage where there will be no availability at any time until the planned outage has ended. If you selected **Forced** under **Type**, the only option available is **Continuous**.

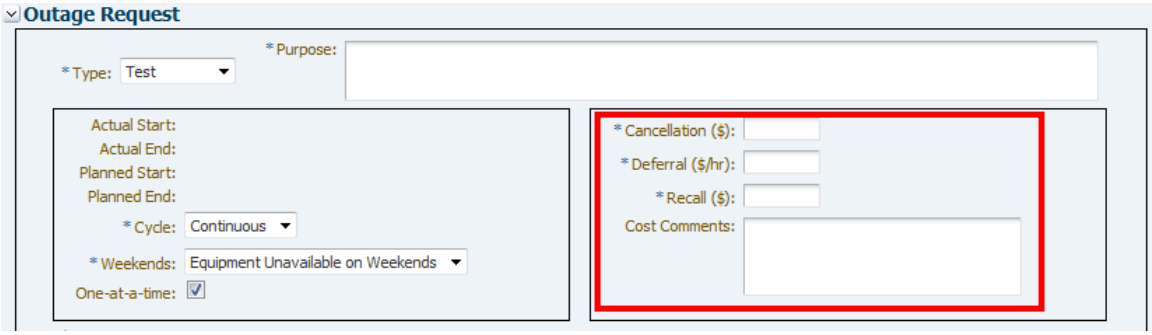
Weekends: If the outage will span a weekend and the equipment will be completely unavailable, you must check off **Equipment Unavailable on Weekends**. If the outage will span a weekend and the equipment will be available for the entire weekend, you must check off **Equipment Available on Weekends**. NOTE: If you chose **Forced** under **Type**, the only option available is **Equipment Unavailable on Weekends**.



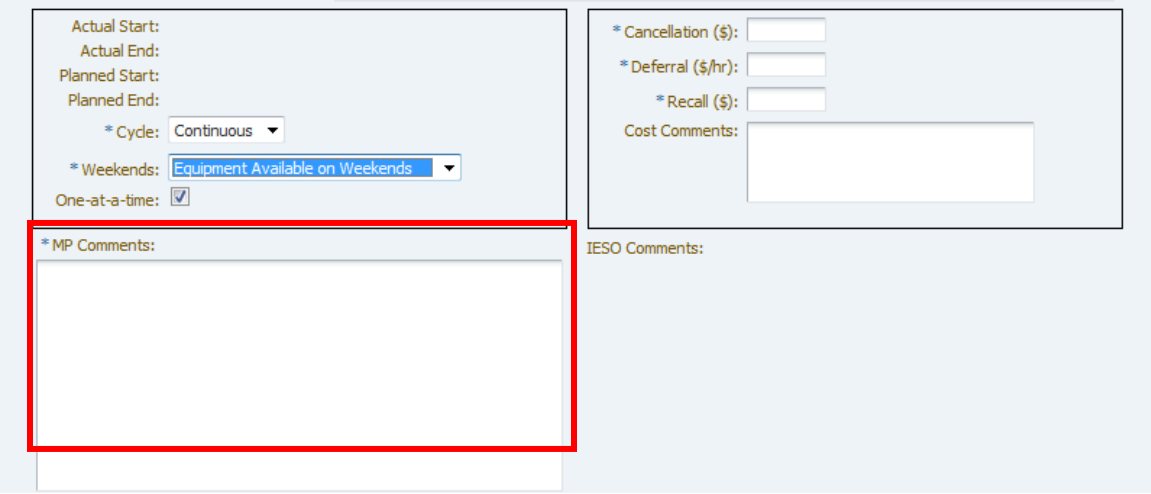
One-at-a-time: This box is for taking redundant equipment out of service, typically protection systems. For example, you would check this box if you were taking 'A' protection out of service and returning 'A' protection to service before taking 'B' protection out of service.



The amounts for Cancellation, Deferral and Recall are no longer required when submitting an outage request, however, the system requires data entry in these fields. Actual costs will only be submitted to the IESO once a cancellation, deferral or recall takes place. Please enter an amount of zero. .



MP Comments: In this box, provide a thorough assessment of the outage you are requesting to undertake, including how it will impact the IESO-controlled grid. For example, provide a description of all of the work and all of the testing you will perform during the outage; if the outage is for redundant equipment, indicate what actions you will be required to perform if your remaining equipment is forced out of service during the outage.

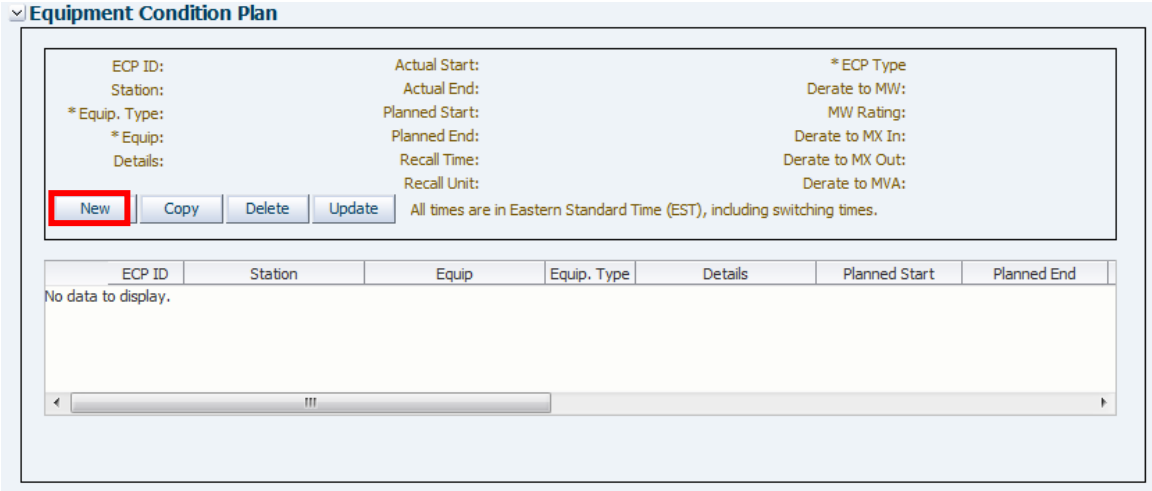


IESO Comments: The IESO may enter comments here once the outage request has been submitted. For example, if the outage request Status is listed as 'Rejected', after you have submitted it, this field normally contains an explanation of why.

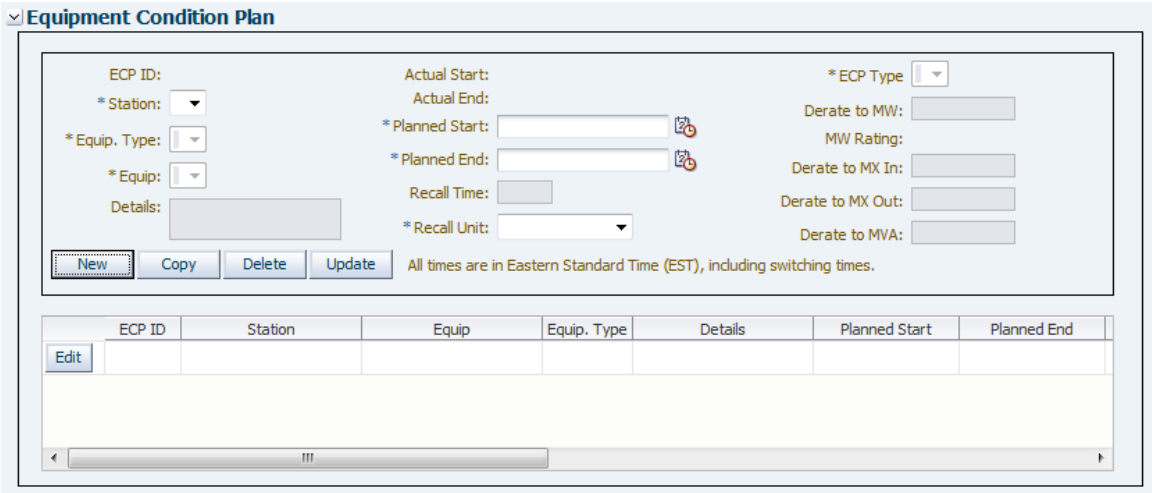
Equipment Condition Plan (ECP) Section

The **Equipment Condition Plan** (ECP) section is where you provide detailed information about *all* of the equipment included in this outage request. There can be multiple ECPs included with an outage request.

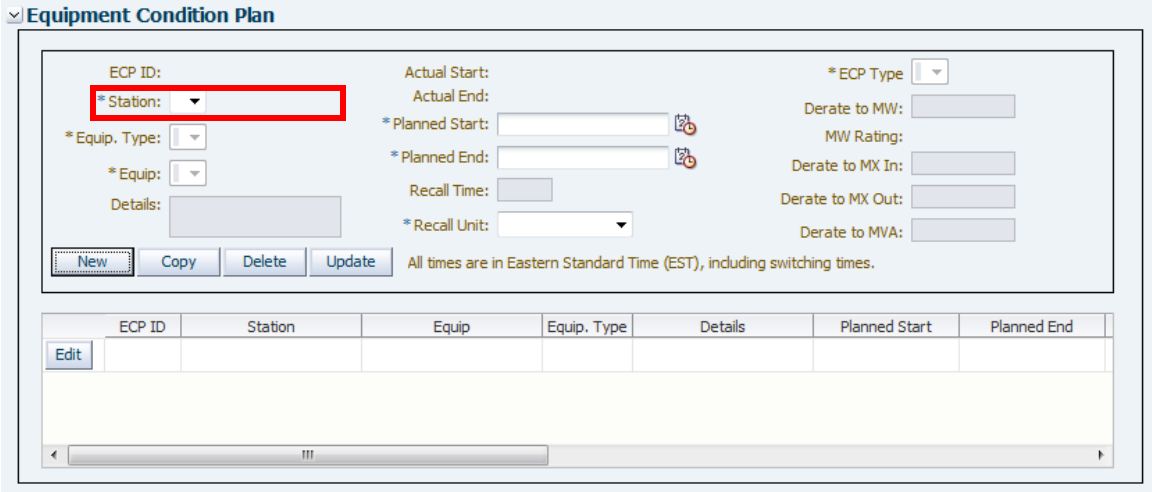
Click **New.**



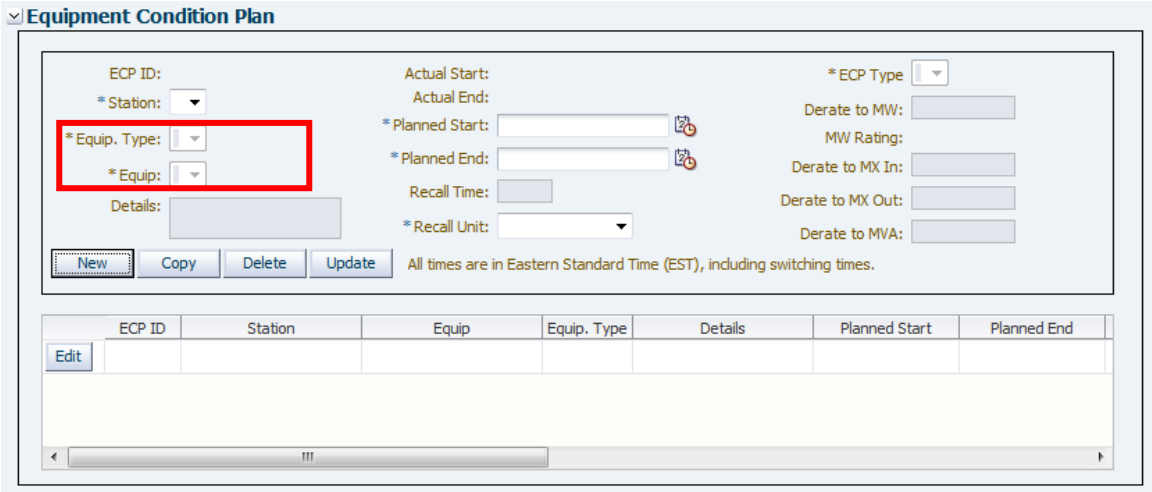
Once you select **New**, the screen will change to allow you to enter details about the equipment included in the outage request.



Station: When you click in this field, a list of all of your organization's stations will appear. Select the one containing the equipment to be included in this ECP. In the case of equipment (such as a transmission line) spanning two stations, enter the "start point".

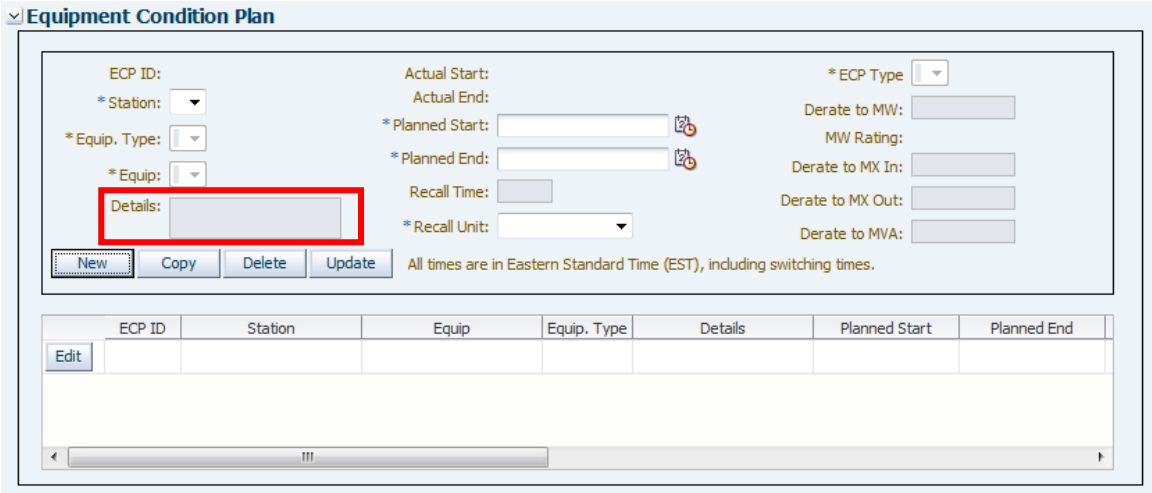


Equipment: Different equipment will appear in the **Equip. Type** section depending on the **Station** chosen. In turn, the **Equip. Type** you select determines what appears in the **Equip.** field.



Details: This field shows details of auxiliary equipment. This field is mandatory when you select the **Equip. Type** '**Auxiliary**'. For example, assume you selected **Auxiliary**, in the **Equip. Type** field and **'Protection Systems'** in the **Equip.** field. You may then add a comment in the **Details** area, such as: 'Remote Trip Channel A at Station XYZ.'

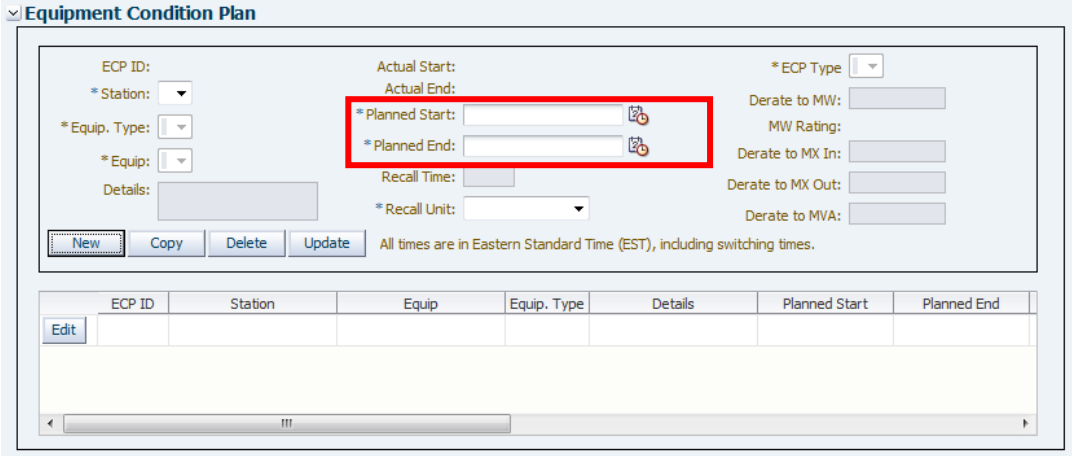
Note: Please refer to Market Manual 7.3: Outage Management, Appendix B for definitions and examples of auxiliary equipment.



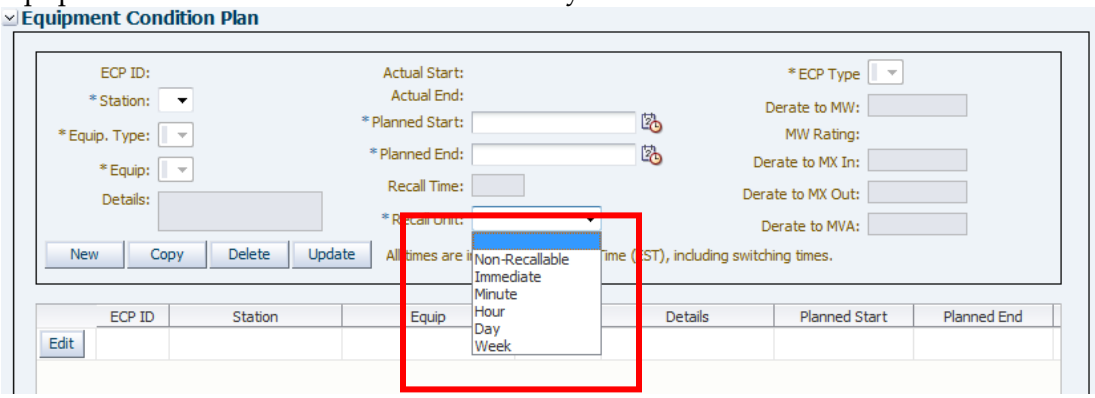
Planned Start/Planned End: Enter the planned start and end for the outage request for this piece of equipment. The times entered in these fields include the period during which the equipment will either be continuously or periodically unavailable, including switching time (see the definition of **Daily** and **Continuous** outages on page 14).

You can use the calendars to the right of the fields, or you can type the dates and times directly into the fields. The correct date and time formats will appear when you click in the field. Remember to enter all times in Eastern Standard Time (EST).

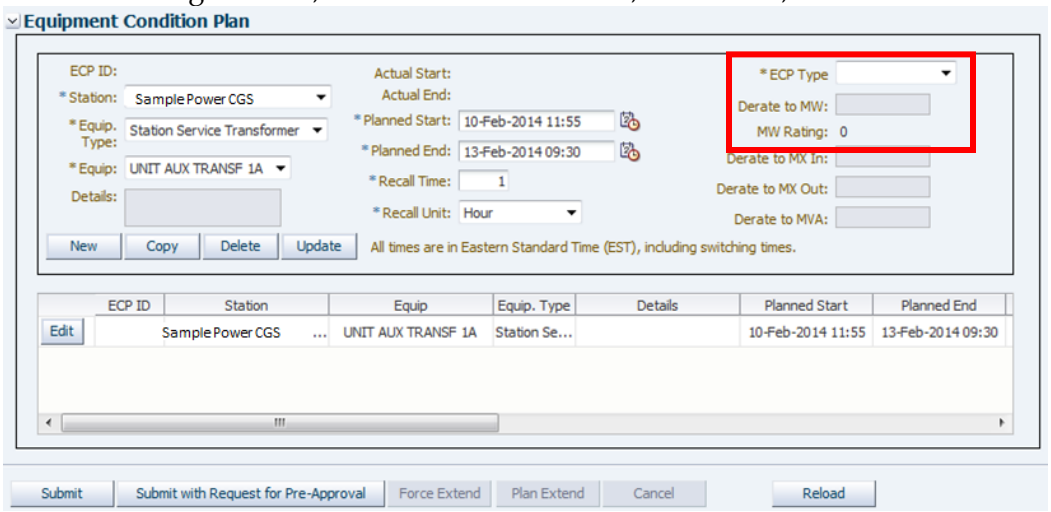
If you use the calendar to select the start and end dates, the start and end *times* will default to the current EST time. Click in the time fields to update the times as needed.



Recall Unit and **Recall Time:** Indicate if the piece of equipment included in the ECP is **Non-Recallable**, or if it can be recalled in a matter of minutes, hours, days, or weeks. If you select anything other than **Non-Recallable** or **Immediate**, you must then enter the number of minutes, hours, days, or weeks required to return the equipment to service should it be recalled by the IESO.



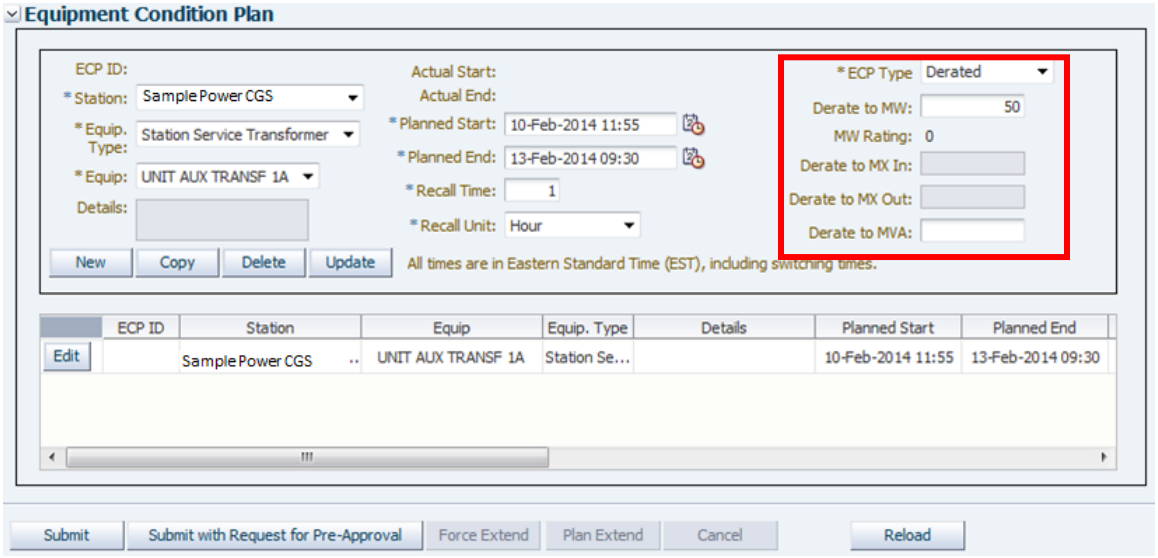
ECP Type: Choose the ECP type. This will vary depending on the type of equipment involved. For example, if you select **Breaker**, the choices are **In service** or **Out of Service**. For a generator, the choices are **Derated**, **In Service**, and **Out of Service**.



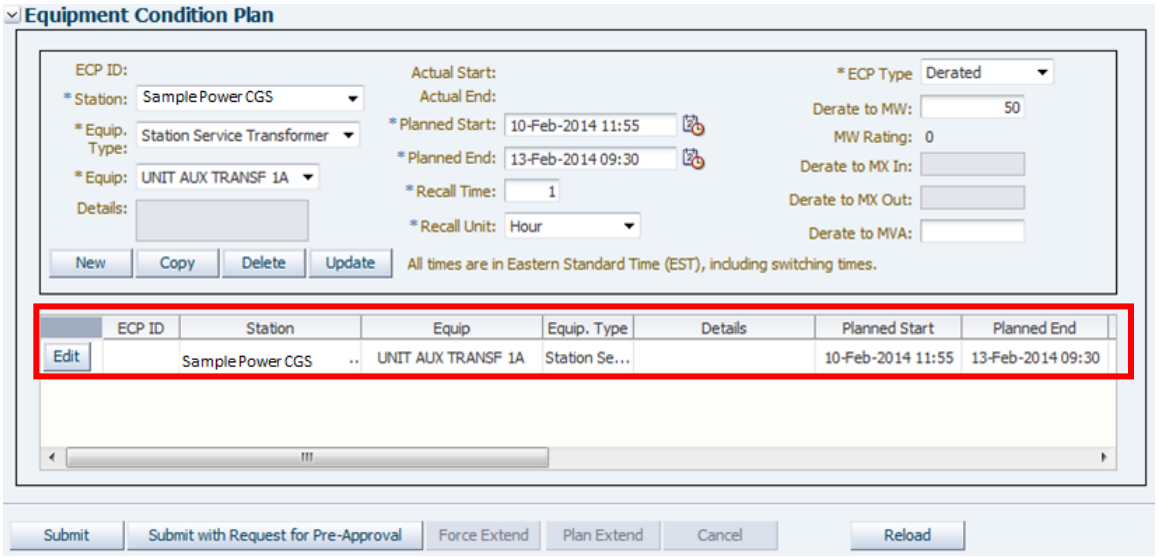
Derate Information: When you select **Derated** for a piece of equipment, the derate parameters will appear.

If the equipment is a transformer, the **Derate to MVA** box becomes available.

If the equipment is a generator, you will have the opportunity to enter the **Derate to MW** information (the output to which the unit will be derated). As a guide, the current installed capacity of the unit will appear in the **MW Rating** field. If you enter a number that is greater than the MW Rating, an error will occur. You may also enter **Derate to MX In** and **Derate to MX Out** information, as needed.

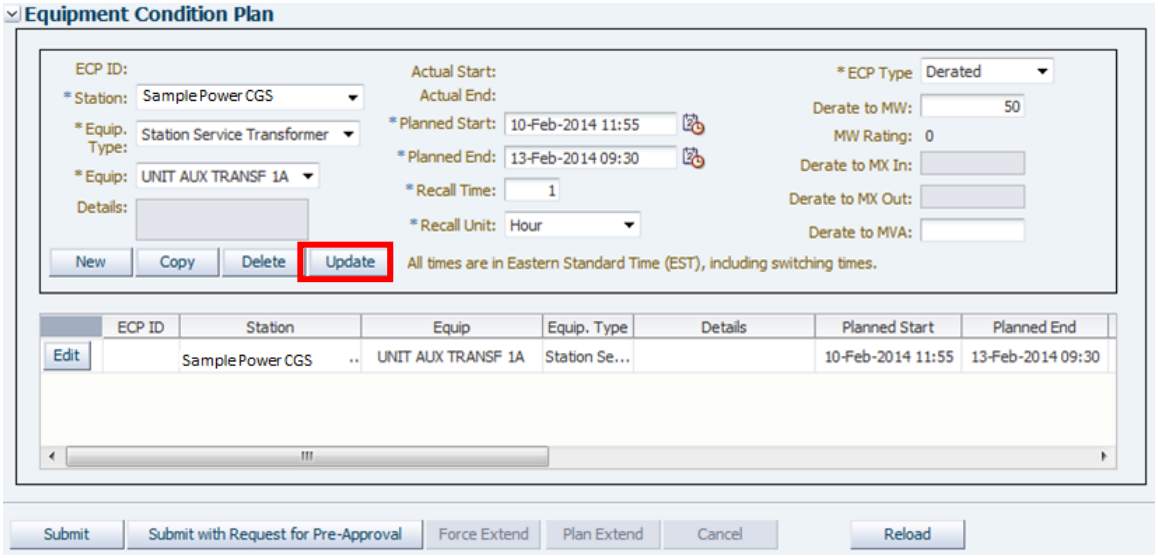


ECP Display Area: You can review a summary of the entered information in the ECP Display Area. This area updates automatically, and allows you to edit previously entered ECPs by clicking Edit.



Update Button

If you are entering information in the **Equipment Condition Plan** box, and it is not automatically being displayed in the **ECP Display Area**, click **Update.**

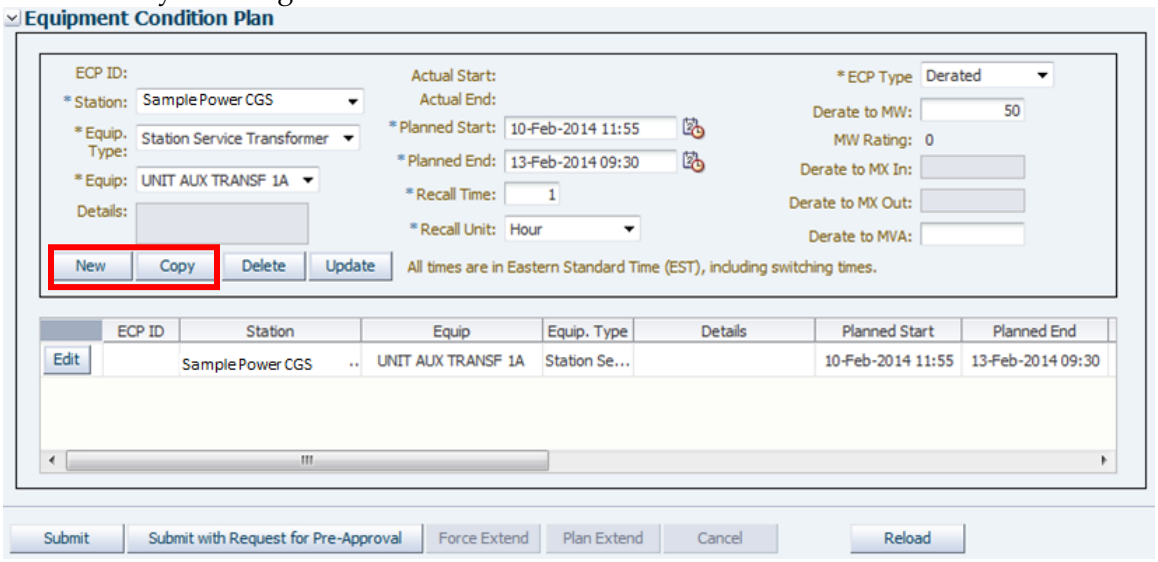


Adding Additional ECPs to the Outage Request

An outage request often includes more than one piece of equipment. You can enter additional ECPs to the request by either clicking **New** or by clicking **Copy**.

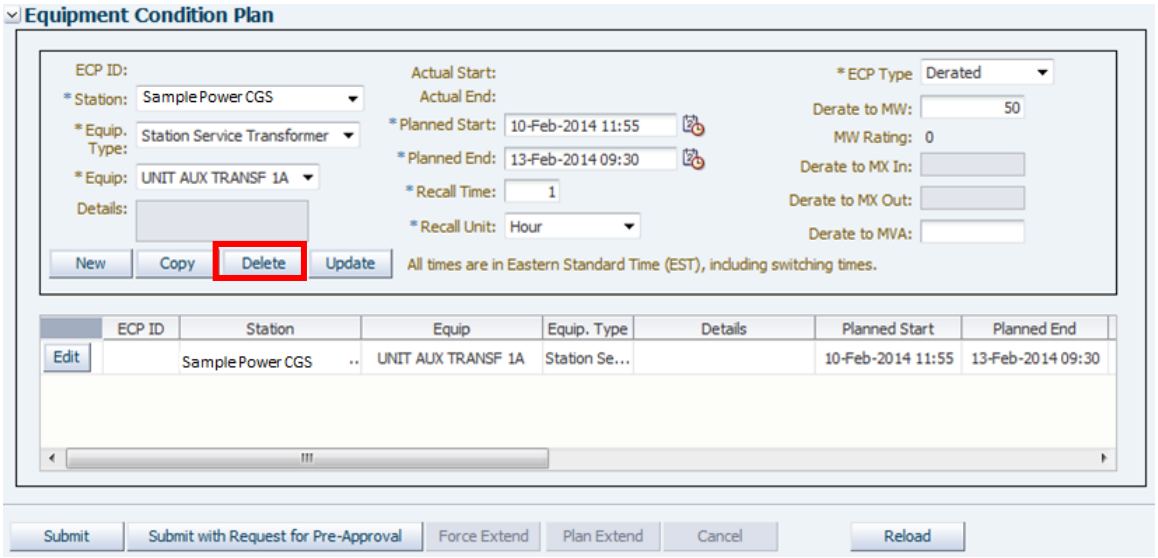
- Clicking **New** will bring up a new blank Equipment Condition Plan for completion. The new ECP will be added as a new line in the ECP Display Area.

- Clicking **Copy** will add a line to the ECP Display Area showing a copy of the last ECP being edited. You can then click on **Edit** next to the copied ECP to modify it as required. The information on this line will be updated in the **Equipment Condition Plan** box as you change it.



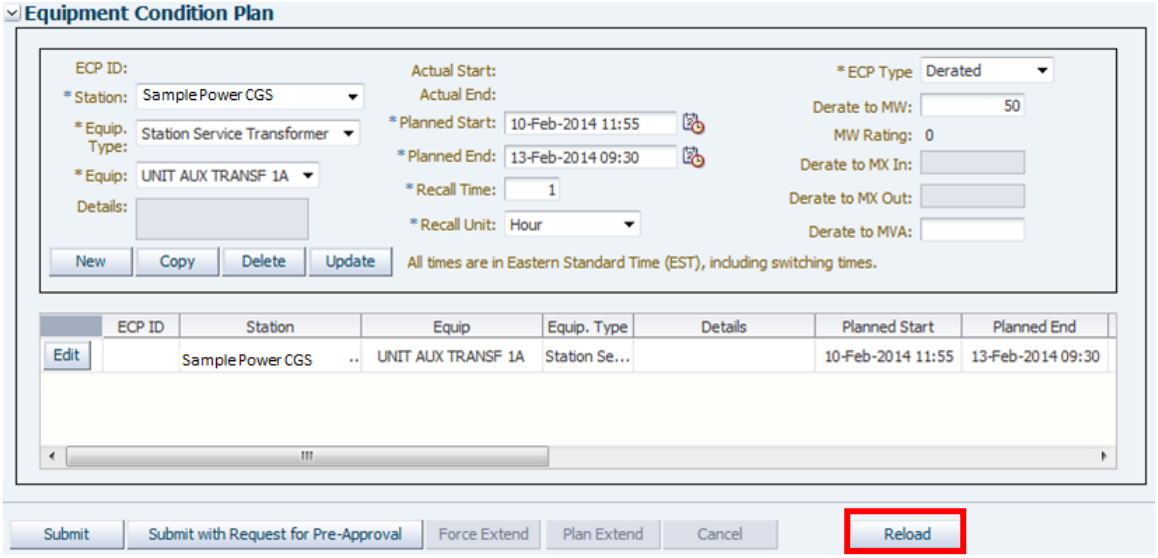
Delete Button

If you need to remove an ECP from the outage request, click **Edit** beside the entry in the ECP Display Area, and then click **Delete.**



Reload Button

The **Reload** button will replace the information in the form with the last data saved to the database for that outage request.

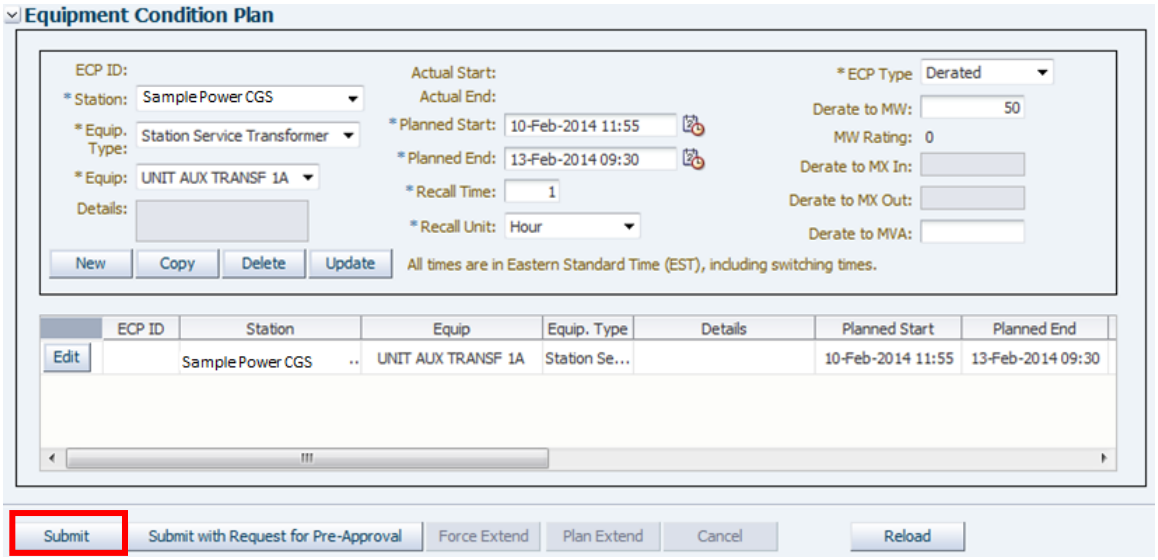


Step Five

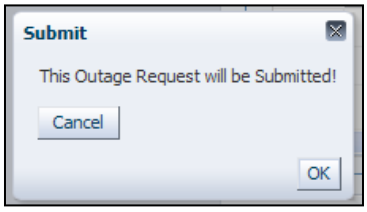
If you are ready to submit the outage, click **Submit** if requesting 3-day advance approval, or click **Submit with Request for Pre-Approval** if requesting pre-approval (1-day advance approval).

All planned outages eligible for requesting pre-approval (i.e., 1-day advance approval for a subset of planned outages with relatively low impact to the IESO-controlled grid) must be submitted by 16:00 EST, 2 business days in advance of the planned start date. The IESO will approve or reject these outages by 14:00 EST, 1 business day in advance of the planned start date.

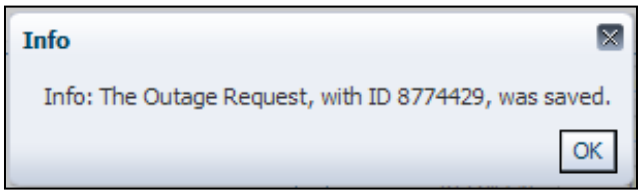
- An eligible outage must meet prescribed criteria that help ensure the planned outage has a relatively low impact to the IESO-controlled grid. The prescribed criteria can be found in *Market Manual 7.3, Appendix B*.



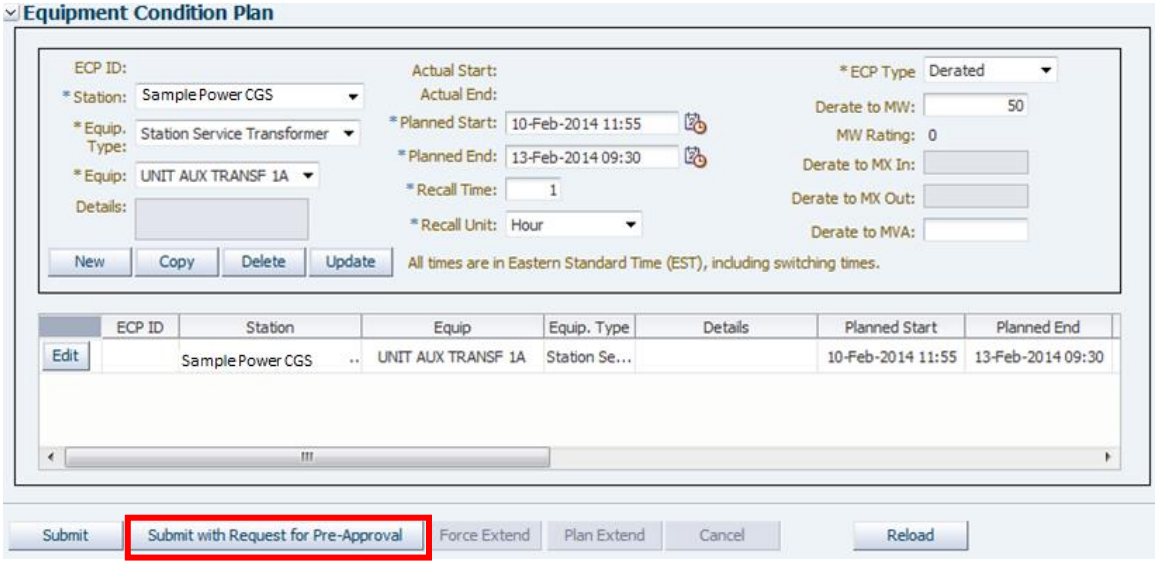
If you click **Submit**, a pop-up appears in the lower left-hand corner, near the **Submit** button. Click **Cancel** to return to the entry or **OK** to complete submission of your Outage.



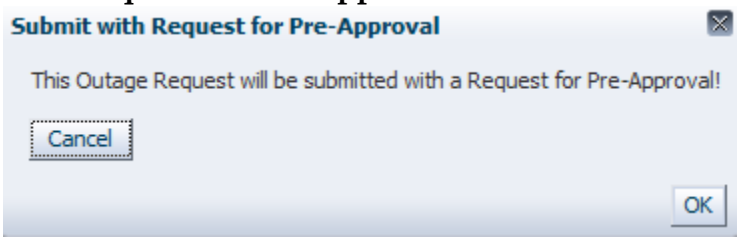
An information box appears with your Outage Request ID number.



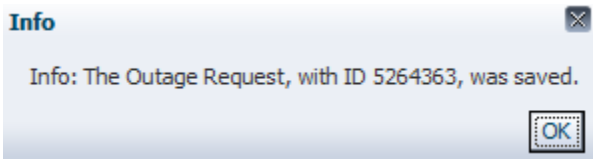
Clicking **Submit with Request for Pre-Approval** tells the IESO that you request a pre-approval (1-day advance approval) and that the request meets the prescribed criteria found in *Market Manual 7.3, Appendix B*.



Click **Submit with Request for Pre-Approval**.

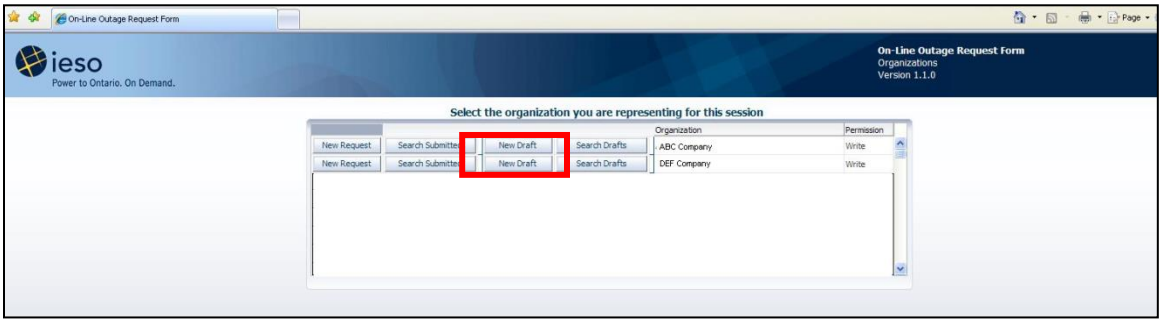


Click **Cancel** to return to the entry or **OK** to submit the outage with a request for pre-approval (1-day advance approval). If a pop-up appears click **OK**:



5. Submitting an Outage Request via the 'New Drafts' Button

This page allows you to select the organization for which you wish to enter, revise, view or cancel an outage. You will see a list of the organizations for which you are authorized to manage outage requests. If you are only authorized by one organization, you will only see that organization in the list.



This page also shows what level of access you have for the organization:

- **Write** access allows you to enter, revise and view submitted or draft outages.
- **Read** access allows you to view submitted or draft outages but not enter or revise outages.

With either type of access, you can:

- Search for submitted outage requests by selecting Search Submitted
- Search for outages that have so far been entered only in draft form by selecting Search Drafts

If you have write access, you can also enter a new outage. There are two different ways to begin to enter an outage using the **On-line Outage Request Form** tool:

1. If you are ready to create or submit a complete Outage request to the IESO, click New Request to complete a form. After you have completed the entry of your information, the tool will require you to submit the request.
2. If you do not yet have all of your information but would like to begin entering an outage, click New Draft to start a form. Here, you will be able to enter and save information to the Outage database without submitting the form to the IESO. Once the On-line Outage Request Form is complete, it can be submitted to the IESO through the Search Drafts function.

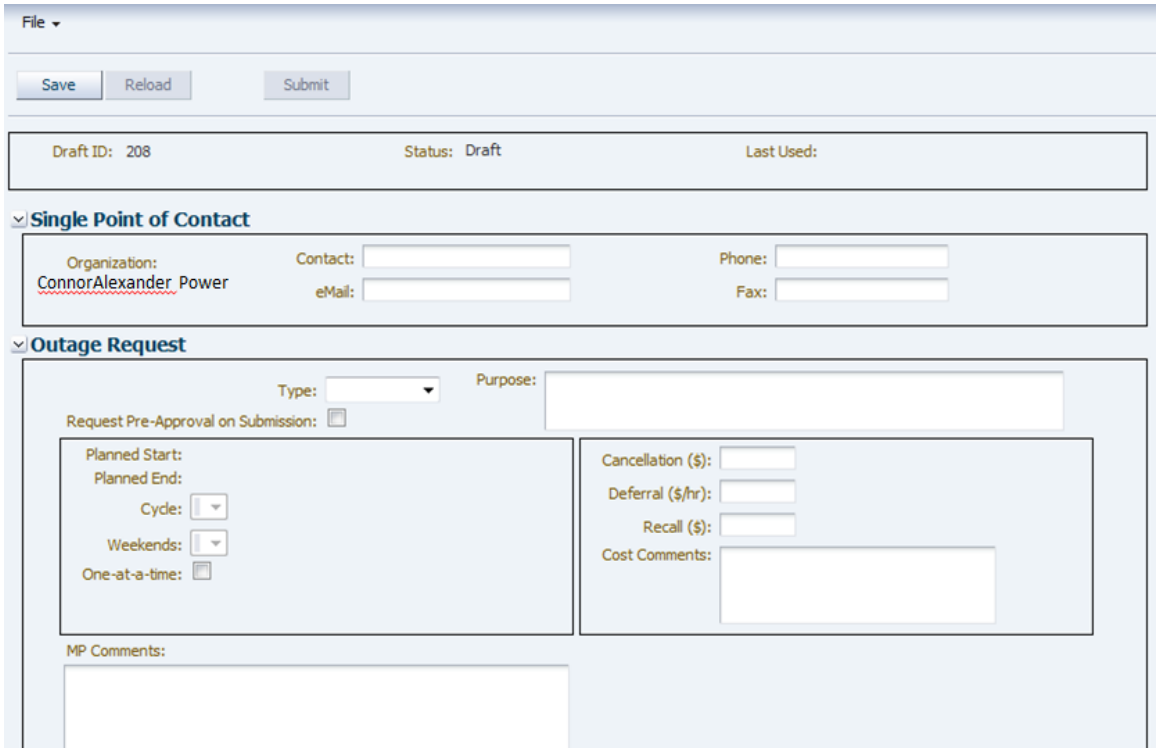
NOTE: This section explains the process if you click the New Draft button. Section 4, **'Submitting an Outage Request via the 'New Request Button,'** above, will explain the process to follow if you select New Request.

Step One

Click the New Draft button.

Step Two

You will be taken to the **On-Line Outage Request Form: Edit Draft Outages** page. This form is where you enter your new outage request.

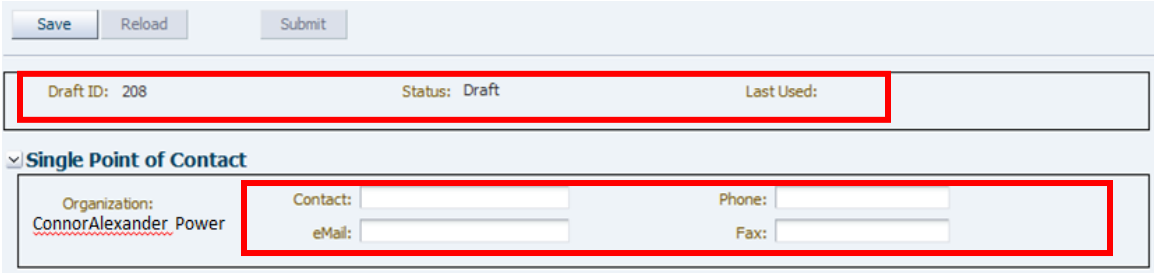


Completing the Form

Here are a few tips about completing the different sections of this form:

Status and Single Point of Contact Sections

This section will indicate the **ID** number for this outage request as well as the **Status** '**Draft**'. The **Last Used** section indicates the date of the last update to the draft. It will remain blank until the request has been saved.

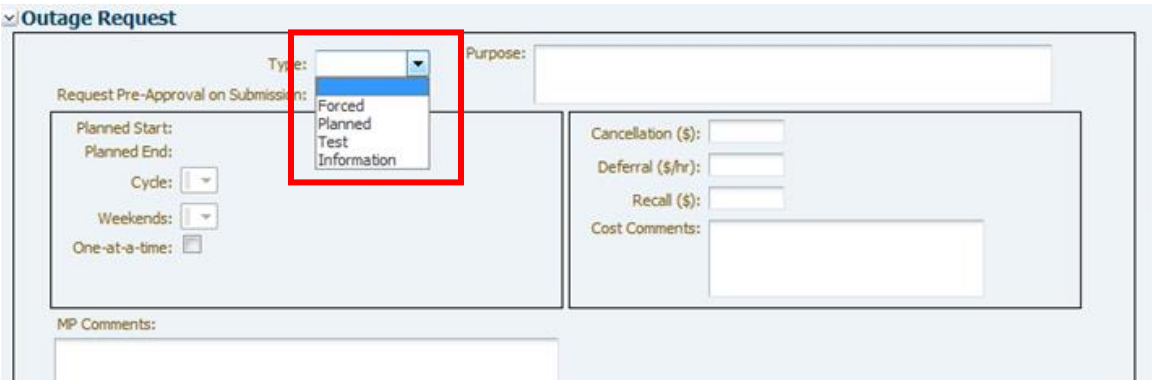


The fields in the **Single Point of Contact** section are not mandatory in **Search Drafts**. When you are ready, enter the contact information for the person the IESO should interact with about the outage request. To help you complete this section, when you click in each box, the format required to enter this data will be shown.

Outage Request Section

The **Outage Request** section is where you provide some basic information about the outage. The fields in this section are not mandatory when using **Search Drafts.**

Type: Select from **Planned, Forced, Test**, or **Information**. Depending on which **Type** you select, different choices will be made available on the remainder of the form.



- **Planned**: A planned, intentional outage or derate submitted to the IESO with adequate advance notice
- **Forced**: An outage or derate taken to prevent damage or to protect the public or the environment. Forced outages may result from the automatic removal of equipment from service, manual removal of equipment from service without advance planning, or may be subject to advance planning if the forced outage has time-limited flexibility (urgent outages).
- **Test**: Required for an abnormal condition or configuration
- **Information**: Other; e.g. planned shutdown, demand control actions

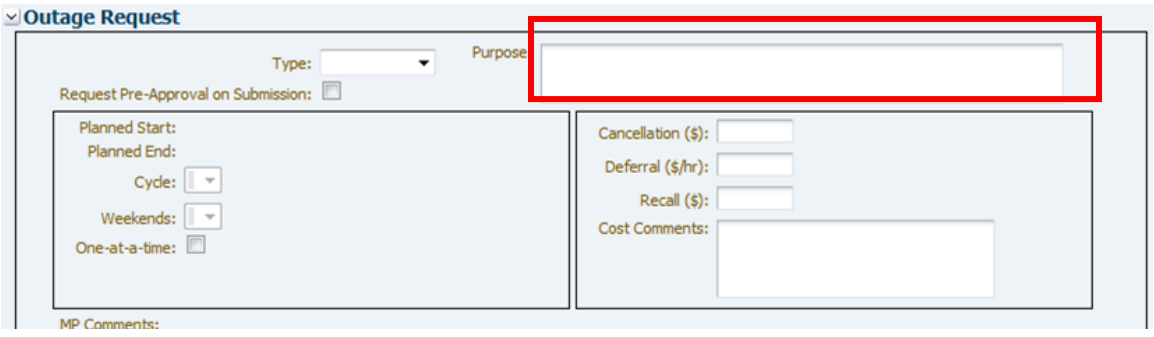
NOTE: If entering an outage or derate for a Wind or Solar facility, any changes in overall facility capacity must be applied to the aggregate resource. Two examples:

- Assume that your wind facility is made up of one hundred 1 megawatt turbines. Fifty turbines feed radially into one breaker, while the other fifty turbines feed radially into another breaker. If you plan to take one of these breakers out of service, you would have to derate your aggregate resource by 50 MW.

- Assume you want to take your facility's grid connected step-up transformers out of service for maintenance. This makes your facility completely unable to generate for the duration of the outage. In this situation, you are required to submit an outage to your aggregate resource in addition to the one submitted for your step-up transformers.

See the **Equipment Condition Plan (ECP)** Section below for information on submitting an outage or derate.

Purpose: Explain why you are taking this outage.

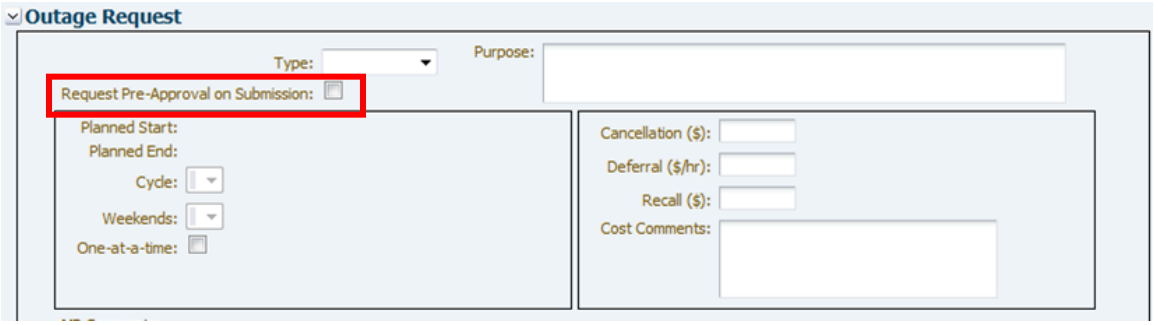


Request Pre-Approval on Submission: When you have completed a saved draft outage request, you will have the opportunity to click the **Submit** button. Selecting **Request Pre-Approval on Submission** in a draft Outage Request allows you to save a step later by choosing to Request Pre-Approval for the outage at the same time that you submit it. To do this, you must ensure your Outage Request qualifies for pre-approval (1-day advance approval).

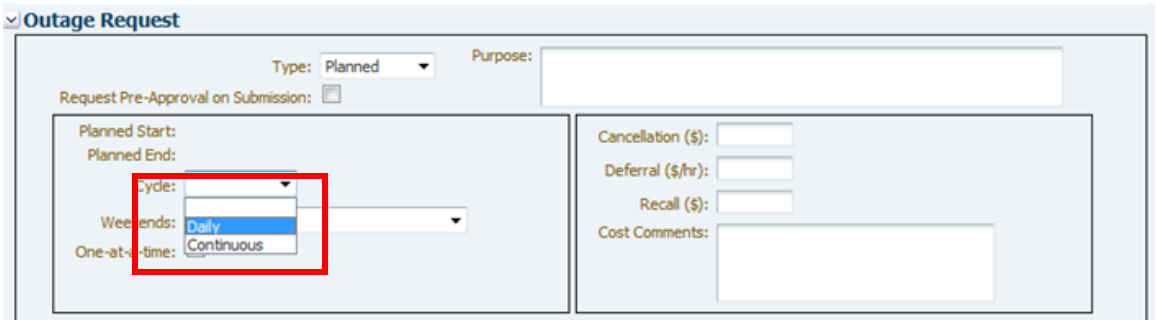
All planned outages eligible for requesting pre-approval (i.e., 1-day advance approval for a subset of planned outages with relatively low impact to the IESO-controlled grid) must be submitted by 16:00 EST, 2 business days in advance of the planned start date. The IESO will approve or reject these outages by 14:00 EST, 1 business day in advance of the planned start date.

An eligible outage must meet prescribed criteria that help ensure the planned outage has a relatively low impact to the IESO-controlled grid. The prescribed criteria can be found in Market Manual 7.3, Appendix B.

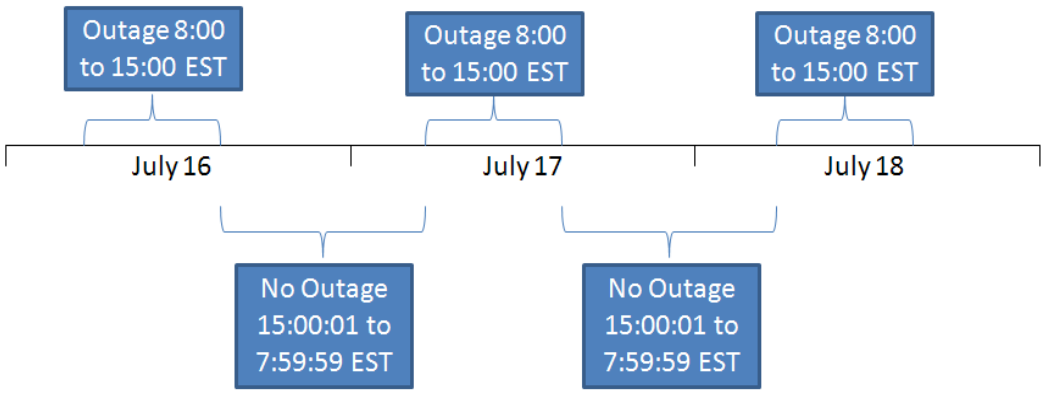
If you do not select this box, you will have to separately **submit and request pre-approval.**



Cycle: If you selected anything but **Forced** under **Type**, you must choose between either **Daily** or **Continuous** by clicking the pull-down.



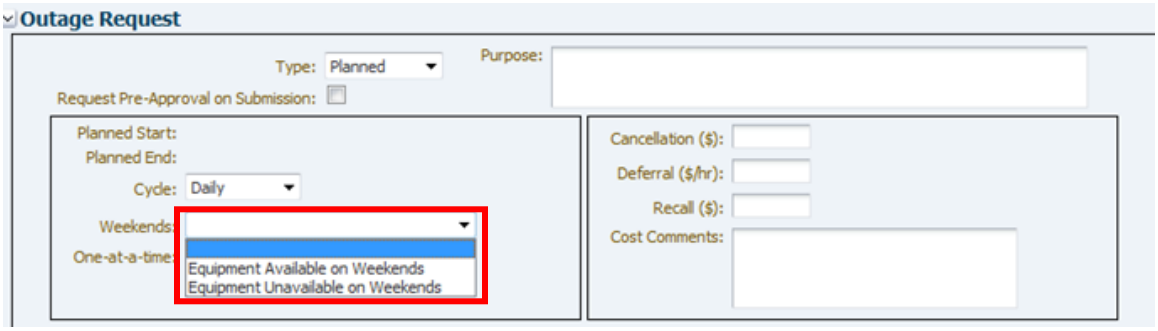
Daily means the outage will occur during set times over one or more days. For example, assume you have an outage that requires work to be done between 08:00 and 15:00 EST each day from Wednesday, July 16 to Friday, July 18. During the times in between, however, the equipment will be available for use. In this example, the **Planned Start** would be entered as "July 16, 2014 08:00" and the **Planned End** would be entered as "July 18, 2014 15:00" (see page 38). Specifying **Daily** in this example tells the IESO that your equipment will be unavailable between 8:00 and 15:00 EST each day of the outage, but available again starting at 15:00 ending when the next day's work begins at 08:00. This schedule will repeat daily from July 16th until the outage ends on July 18th.


Outage 8:00 to 15:00 EST
Outage 8:00 to 15:00 EST
Outage 8:00 to 15:00 EST
July 16
July 17
July 18
No Outage 15:00:01 to 7:59:59 EST
No Outage 15:00:01 to 7:59:59 EST

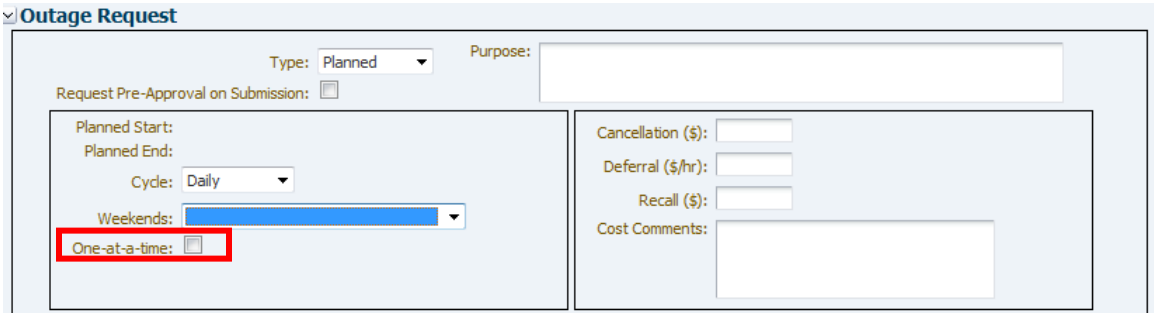
Continuous means an equipment outage where there will be no availability at any time until the planned outage has ended.

If you selected **Forced** under **Type**, the only option available is **Continuous**.

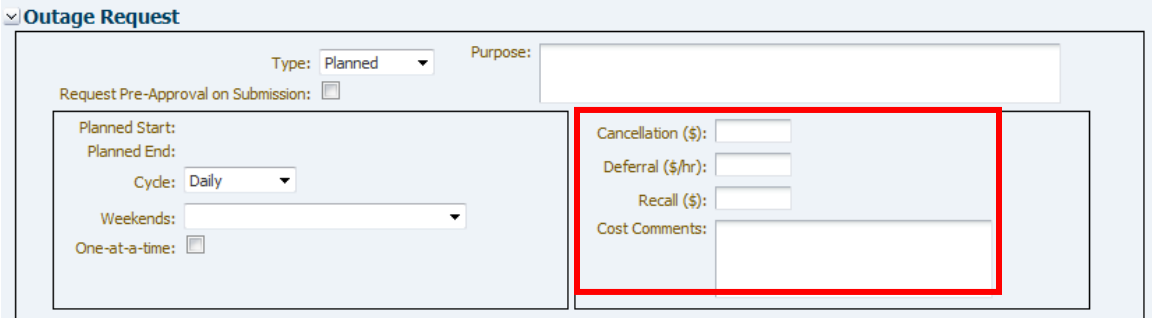
Weekends: If the outage will span a weekend and the equipment will be completely unavailable, you must check off **Equipment Unavailable on Weekends**. If the outage will span a weekend and the equipment will be available at times, you must check off **Equipment Available on Weekends**. **NOTE:** If you chose **Forced** under **Type**, the only option available is **Equipment Unavailable on Weekends**.



One-at-a-time: This box is for taking redundant equipment out of service, typically protection systems. For example, you would check this box if you were taking 'A' protection out of service and returning 'A' protection to service before taking 'B' protection out of service.

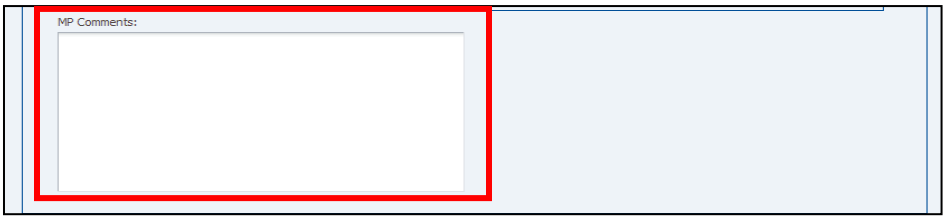


The amounts for Cancellation, Deferral and Recall are no longer required when submitting an outage request, however, the system requires data entry in these fields. Actual costs will only be submitted to the IESO once a cancellation, deferral or recall takes place. Please enter an amount of zero.



MP Comments:

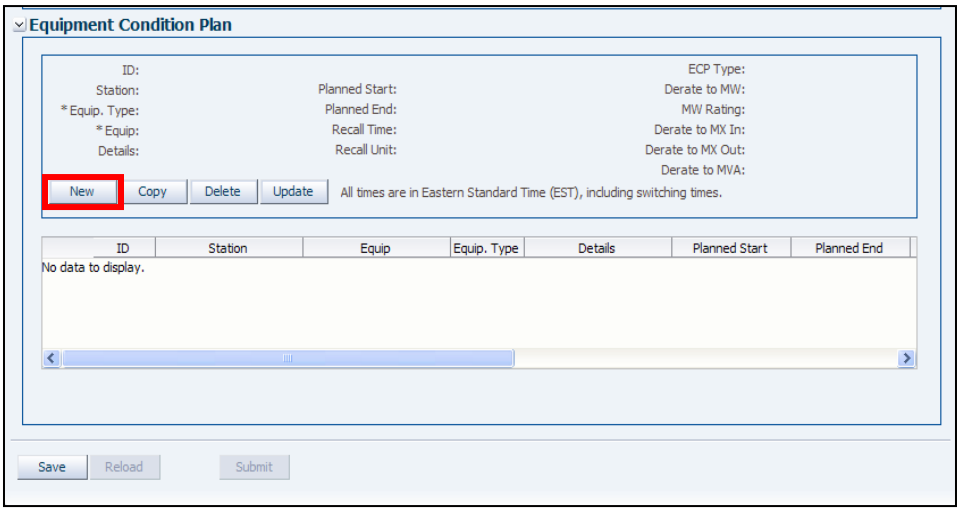
In this box, provide a thorough assessment of the outage you are requesting to undertake, including how it will impact the IESO-controlled grid. For example, provide a description of all of the work and all of the testing you will perform during the outage; if the outage is for redundant equipment, indicate what actions you will be required to perform if your remaining equipment is forced out of service during the outage.



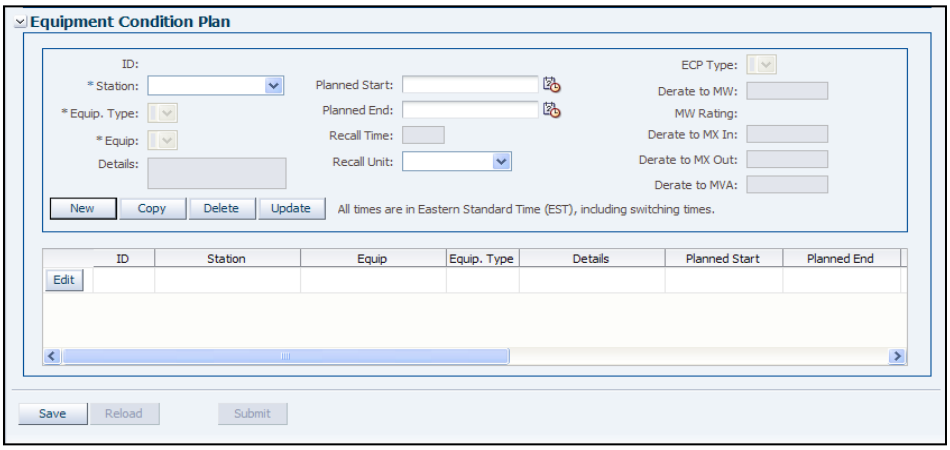
Equipment Condition Plan (ECP) Section

The **Equipment Condition Plan** (ECP) section is where you provide detailed information about *all* of the equipment included in this outage request. There can be multiple ECPs included with an outage request.

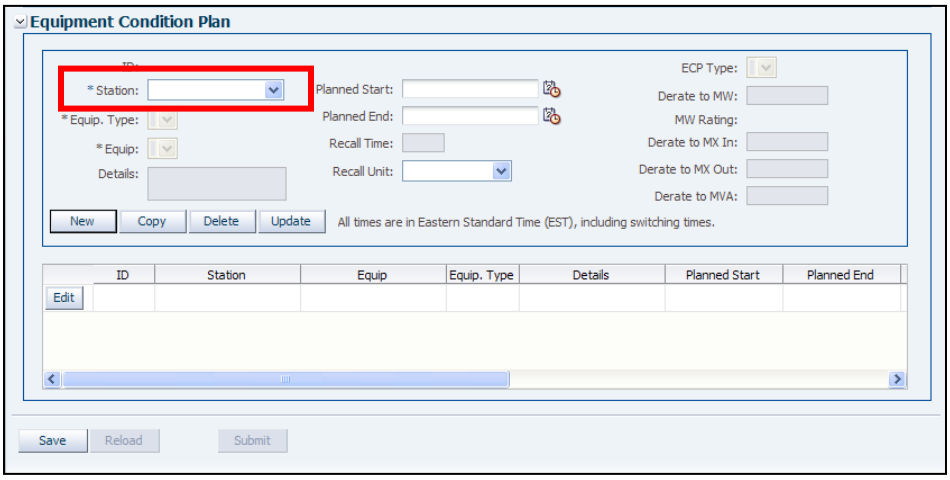
Click on **New.**



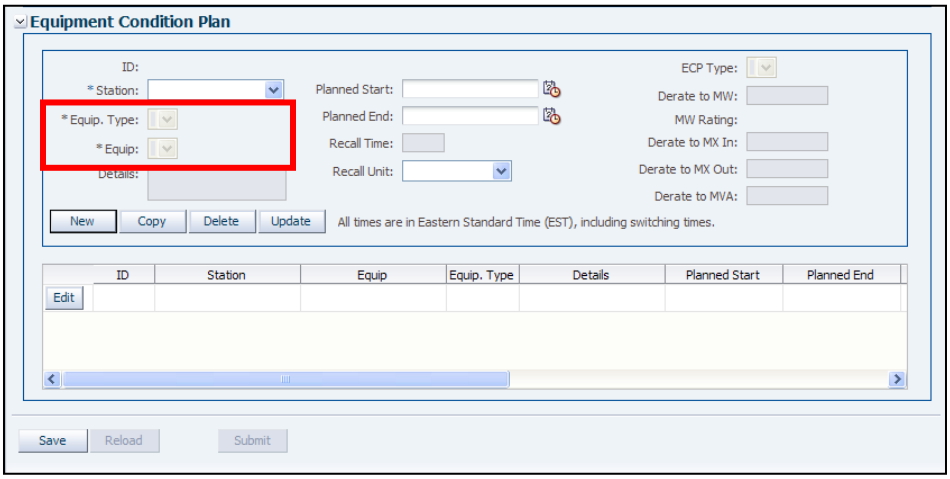
Once you select **New**, the screen will change to allow you to enter details about the equipment included in the outage request:



Station: When you click the drop-down menu in this field, a list of all of your organization's stations will appear. Select the station containing the equipment to be included in this ECP. In the case of equipment (such as a transmission line) spanning two stations, enter the "start point".

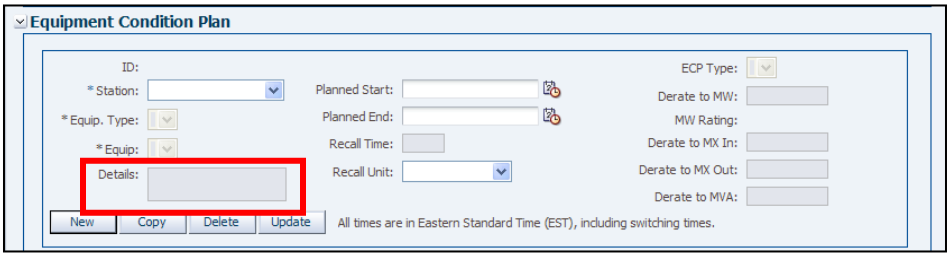


Equipment: Different equipment will appear in the **Equip. Type** section depending on the **Station** chosen. In turn, the **Equip. Type** chosen determines what appears in the **Equip** field.



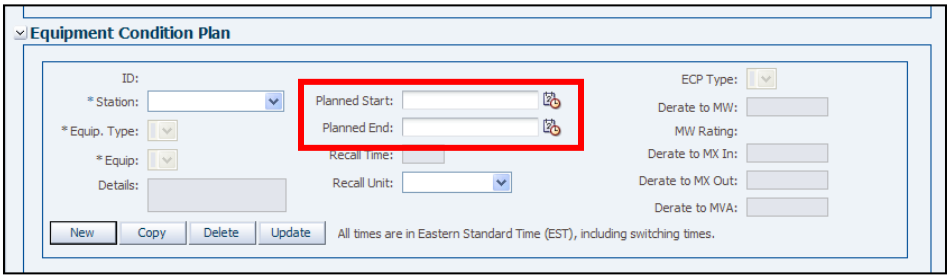
Details: This field shows details of auxiliary equipment. This field is mandatory when you select the **Equip. Type** '**Auxiliary**'. For example, if you selected **Auxiliary**, in the **Equip. Type** field and **Protection Systems** in the **Equip** field, you would then add a comment in the **Details** box, such as: 'Remote Trip Channel A at Station XYZ.'

Note: Please refer to Market Manual 7.3: Outage Management, Appendix B for definitions and examples of auxiliary equipment.

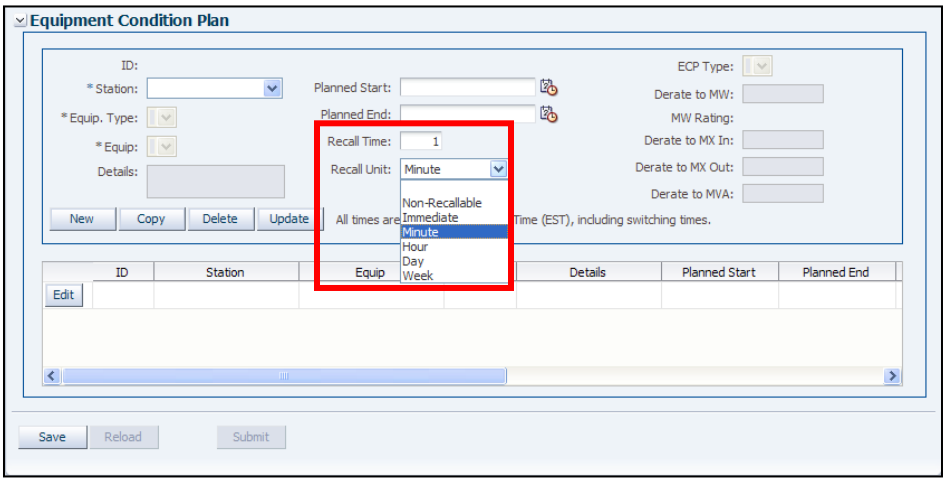


Planned Start/Planned End:

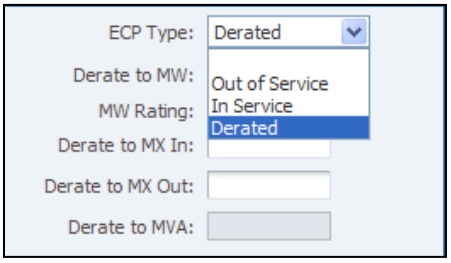
Enter the planned start and end for the outage request for this piece of equipment. The times entered in these fields include the period during which the equipment will either be continuously or periodically unavailable, including switching time (see the definition of **Daily** and **Continuous** outages on page 38).You can use the calendars to the right of the fields, or you can type the dates and times directly into the fields. The correct date and time formats will appear when you click in the field. Remember to enter all times in Eastern Standard Time (EST). If you use the calendar to select the start and end dates, the start and end *times* will default to the current EST time. Click in the fields and update the times as needed.



Recall Unit and **Recall Time:** Indicate if the piece of equipment included in the ECP is **Non-Recallable**, or if it can be recalled in a matter of minutes, hours, days, or weeks. If you select anything other than **Non-Recallable** or **Immediate**, you must then enter the number of minutes, hours, days, or weeks required to return the equipment to service should it be recalled by the IESO.



ECP Type: Choose the ECP type. This will vary depending on the type of equipment involved. For example, if you select **Breaker** under **Equip. Type** the choices under **ECP Type** are **In Service** or **Out of Service**. For a generator or transformer, the choices are, **In Service**, **Out of Service,** or **Derated**.

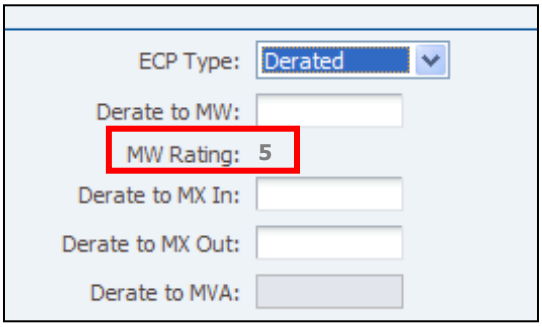


Derate Information: When you select **Derated** for a piece of equipment, the derate parameters will appear.

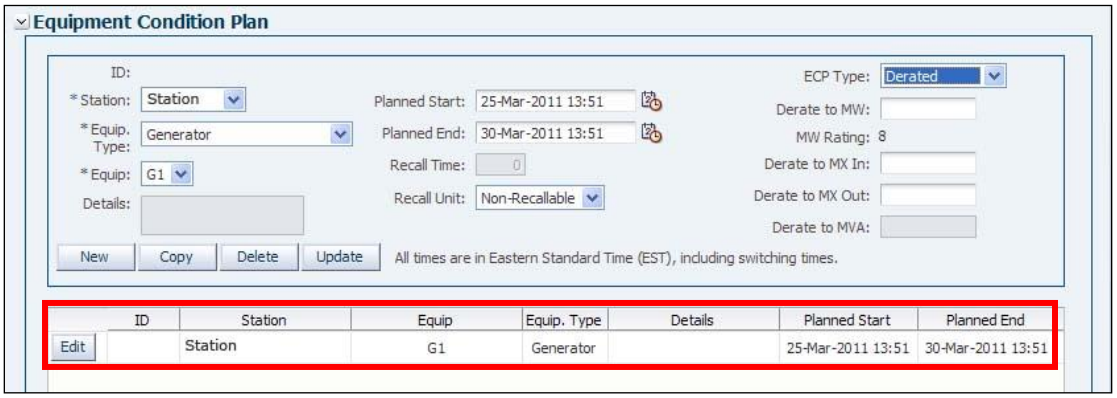
If the equipment is a transformer, the **Derate to MVA** box becomes available.

If the equipment is a generator, you will have the opportunity to enter the **Derate to MW** information (the output to which the unit will be derated – see next page for more detail.).

As a guide, the current installed capacity of the unit will appear in the **MW Rating** field. If you enter a number that is greater than the MW Rating, an error will occur. You may also enter **Derate to MX In** and **Derate to MX Out** information, as needed.



ECP Display Area: You can review a summary of the entered information in the ECP Display Area. This area updates automatically and allows you to edit previously entered ECPs by clicking on **Edit**.



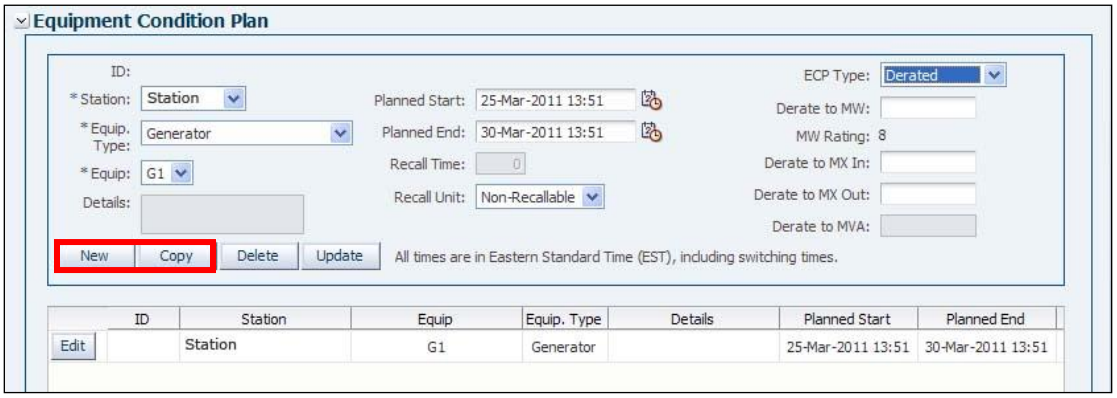
Update Button

If you are entering information in the **Equipment Condition Plan** box, and it is not automatically being displayed in the **ECP Display Area**, click **Update.**

Adding Additional ECPs to the Outage Request

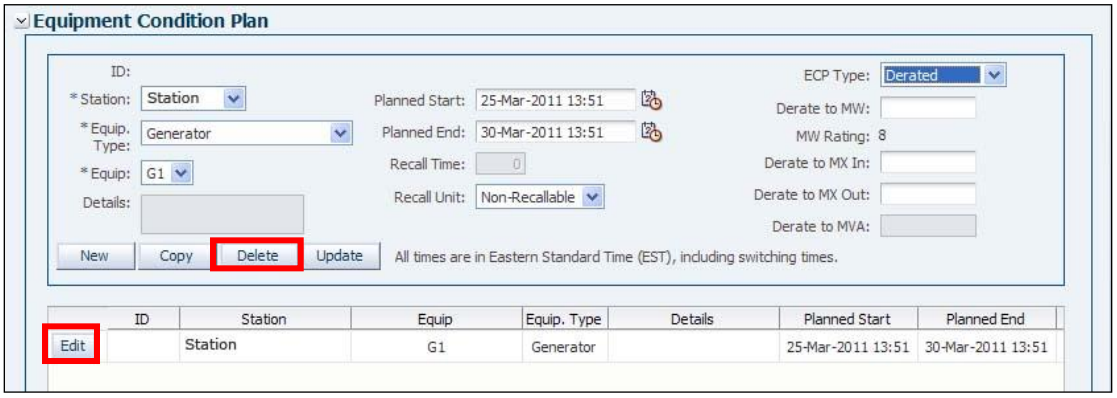
An outage request often includes more than one piece of equipment. You can enter additional ECPs to the request by either clicking **New** or by clicking **Copy**.

- Clicking **New** will bring up a new blank Equipment Condition Plan for completion. The new ECP will be added as a new line in the ECP Display Area.
- Clicking **Copy** will add a line to the ECP Display Area showing a copy of the last ECP being edited. You can then click on **Edit** next to the copied ECP to modify it as required. The information on this line will be updated in the **Equipment Condition Plan** box as you change it.



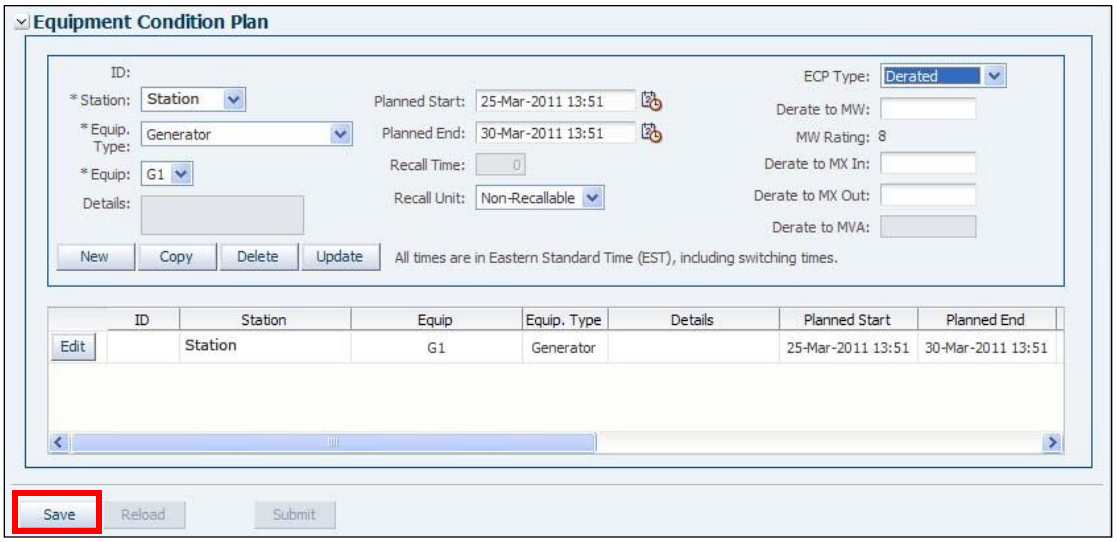
Delete Button

If you need to remove an ECP from the outage request, click **Edit** beside the entry in the ECP Display Area and then click **Delete.**



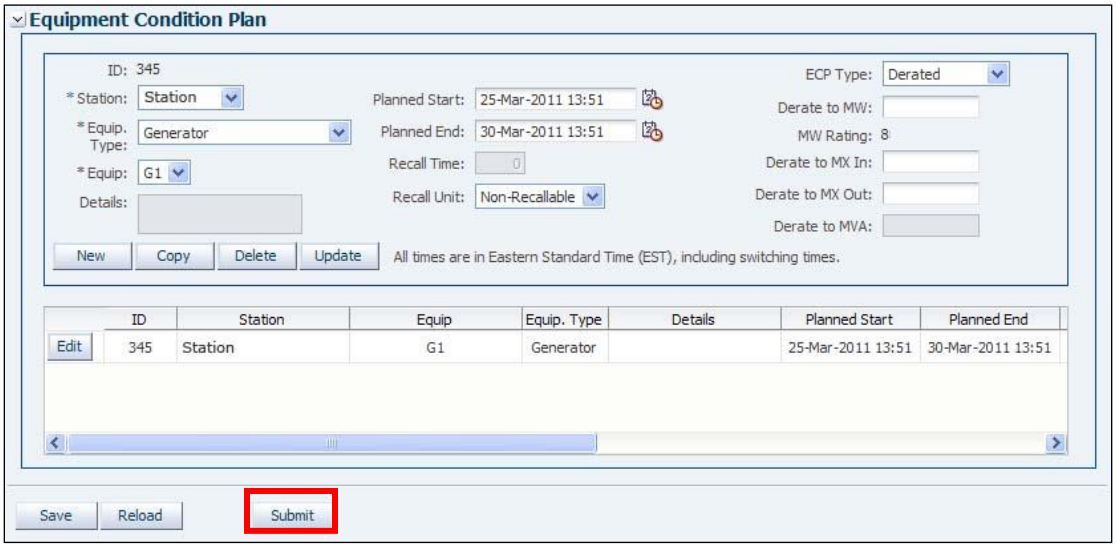
Step Five

Click **Save** to save the outage request in draft form.



An **ID Number** will now appear and the **Reload** and **Submit** buttons will become available.

Clicking the **Reload** button will replace the information in the form with the last data that was saved to the database for that outage request.



Click the **Submit** button if you are ready to submit your outage to the IESO. You will be prompted to complete the information for any missing fields before the submission is accepted and you receive an identification number.

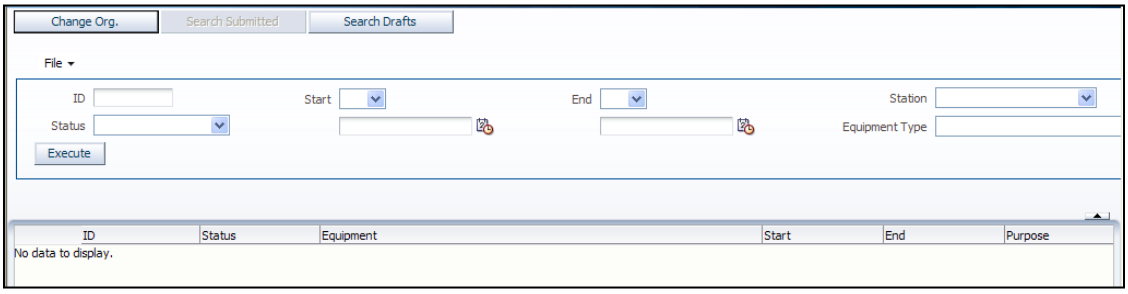
6. Searching for Submitted Outage Data

Step One

On the **On-line Outage Request Form** screen, you will see the list of organizations you have access to view in the Outage Management community. Click the **Search Submitted** button next to the organization to which the submitted outage request you would like to find relates.

Step Two

The **On-line Outage Request Form: Search Submitted Outages** page will appear.



If you would like to see a list of all outages submitted for an organization **(up to 250 search results)**, leave all boxes blank and click **Execute**. To narrow down the search, fill in criteria as desired:

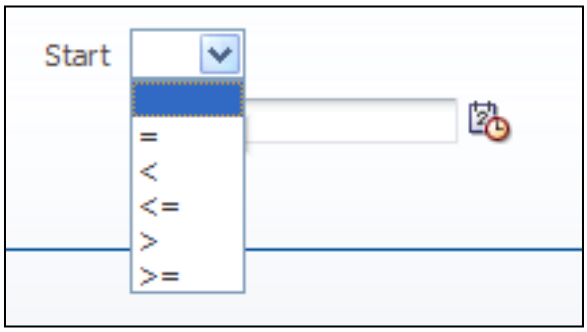
ID

Enter the ID number of the submitted outage if you have it. This is the fastest way to access a specific outage submission.

Start Date/End Date

Enter the start and end date and time of the outage request you are searching for.

When you click on the drop-down menu for start and end dates, symbols appear to facilitate entering the date range you are searching:



=	Search for outages on the indicated date only
<	Search for outages scheduled before the indicated date
<=	Search for outages on or before the indicated date
>	Search for outages after the indicated date
>=	Search for outages on or after the indicated date

Station

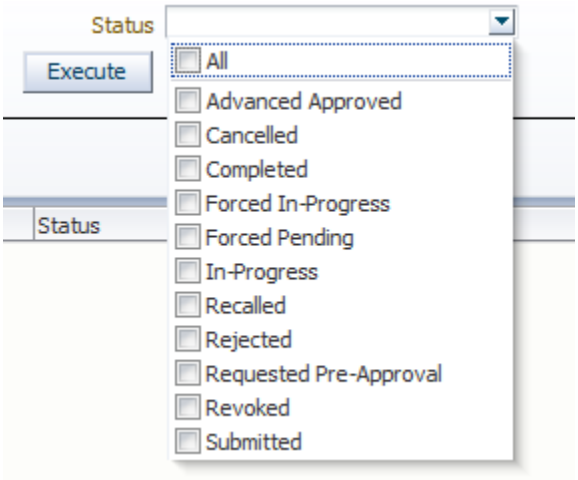
A listing of stations where the selected organization has equipment will appear when you click in this box. Select the station or stations you are searching for.

Equipment Type

A listing of the various types of equipment available at the selected station will appear when you click in the box.

Status

Choose the appropriate outage request status from the drop-down list. Using this feature will allow you to search for outages in a certain status class, whether approved, cancelled, completed, in-progress (or forced in-progress), pending (or forced pending), recalled, rejected, requested pre-approval, revoked, or submitted. These are available for up to 90 days following the closure of the outage request. You may select multiple options at once.

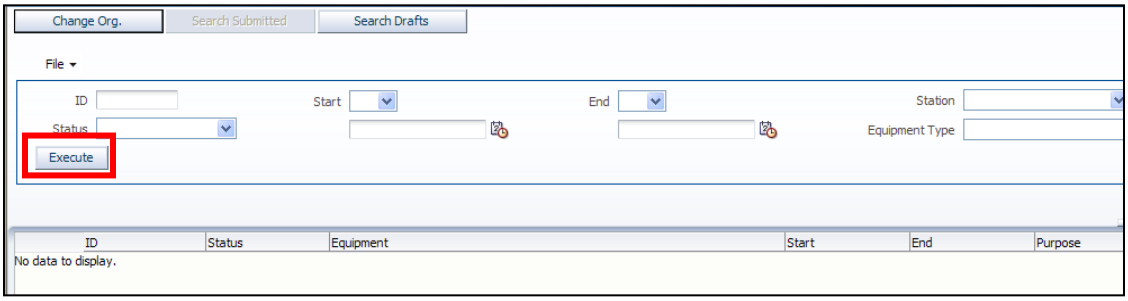


The following table lists the possible status notes for outage requests. Please refer to **Market Manual 7.3 Outage Management** for more detail.

Status	Definition
Advance Approved	Your outage has received advance approval
Cancelled	Your outage is cancelled
Completed	Your outage is completed
Forced In-progress	Your forced outage is in progress
Forced Pending	Your forced outage is pending
In-Progress	Your outage request has received final approval and is in progress
Recalled	Your outage has been recalled
Rejected	Your outage has been rejected
Requested Pre-Approval	You have request pre-approval (1-day advance approval)
Revoked	Your outage has been revoked
Submitted	You have submitted your outage

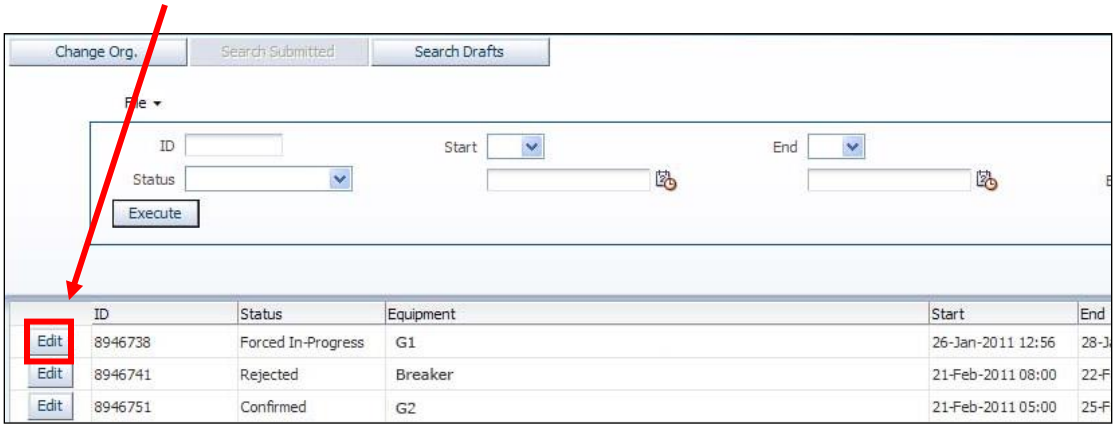
Step Three

When you have entered your desired search parameters, click on **Execute** to run your search. Retrieval is limited to 250 results.



Step Four

If your search returns multiple results, select the outage you want to view or edit by clicking the **Edit** button.



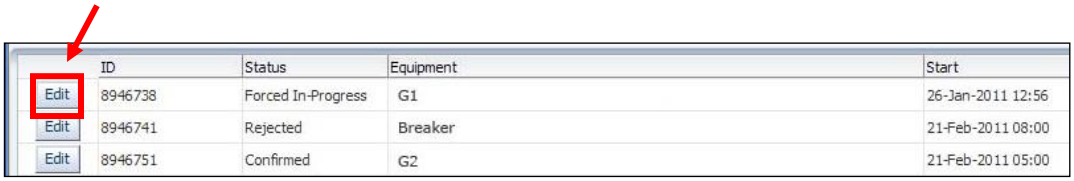
7. Creating a New Draft Outage by Copying a Submitted Outage

It is possible to create a new draft Outage Request by copying and updating the information contained in a previously submitted Outage. This time-saving step is available by first using the **Search Submitted** button to locate the outage you want to copy and then clicking on **Copy to Draft** under **File**.

Step One

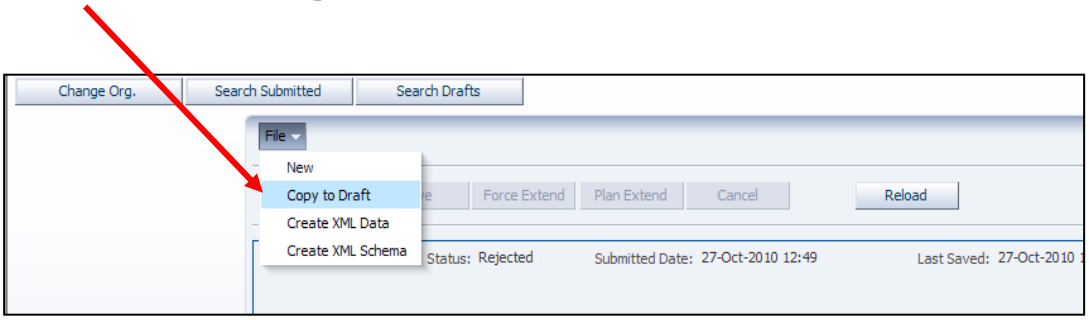
Follow the steps in Section 6, '**Searching for Submitted Outage Data**' to locate the outage you would like to copy.

Click **Edit** next to the outage to retrieve it.



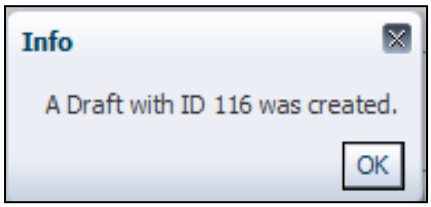
Step Two

After you have retrieved the outage you would like to copy, click on **File** and select **Copy to Draft** in the drop-down menu.



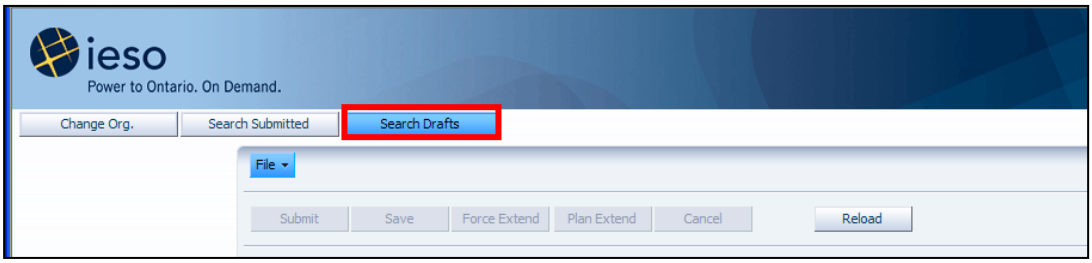
Step Three

An Information Box will appear, providing the **ID** number of your new Draft Outage. It is *very important* to take note of the **ID** number so that you can use it to search for and locate the draft. Click **OK**. You will return to the submitted outage.



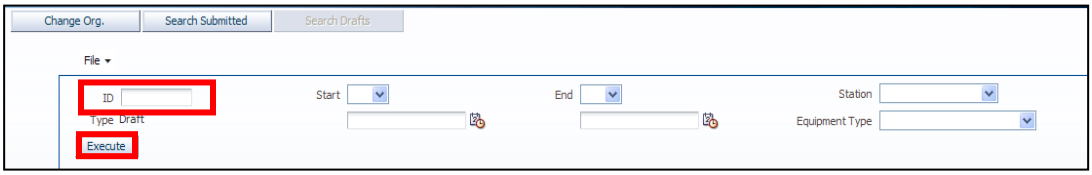
Step Four

To retrieve your new Draft Outage, click the **Search Drafts** button at the top of the submitted outage page.



Step Five

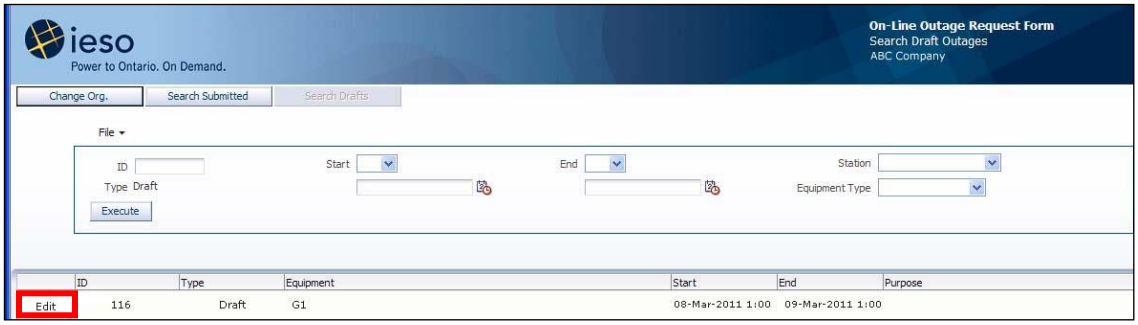
In the **ID** box, type the **ID** number provided in the Information Box when you copied the outage to drafts (see **Step Three**).



Click **Execute**.

Step Six

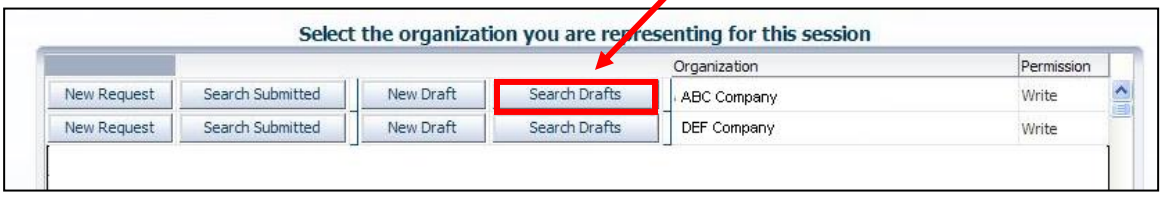
Your new Draft Outage will appear in the search results, containing all the information copied from the original submission. Click **Edit** to modify the Outage as desired. For more information, see Section 5, '**Submitting an Outage Request via the 'Search Draft' Button'** and Section 10, '**Edit Draft Outage Data**'.



8. Searching for Draft Outage Data

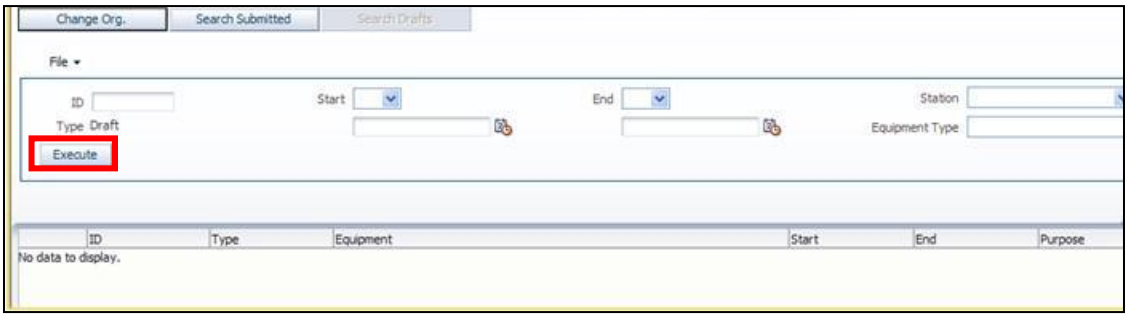
Step One

To search for a previously entered Draft Outage Submission, go to the **On-line Outage Request Form** page. Here, you will see the list of organizations that you have access to in the **Outage Management** community. Click the **Search Drafts** button next to the organization to which the draft outage request you would like to find relates.



Step Two

The **On-line Outage Request Form: Search Draft Outages** screen appears.



If you would like to see a list of all draft outages submitted for an organization (up to 250 search results), leave all boxes blank and click **Execute**. To narrow down the search, fill in criteria as desired:

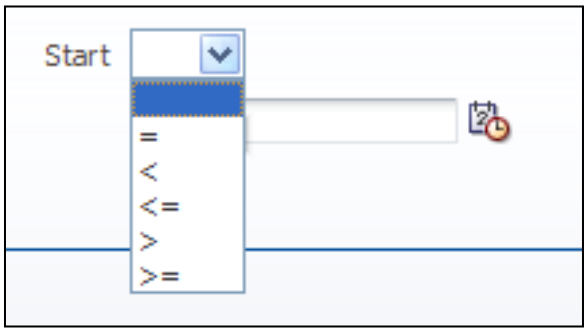
ID

The Draft **ID** number of the outage. This appears in the **ID** box when you start a new draft.

Start Date/End Date

Enter the start and end date and time of the outage request you are searching for.

When you click on the drop-down menu for start and end dates, symbols appear to facilitate entering the date range you are searching:



=	Search for outages on the indicated date only
<	Search for outages scheduled before the indicated date
<=	Search for outages on or before the indicated date
>	Search for outages after the indicated date
>=	Search for outages on or after the indicated date

Station

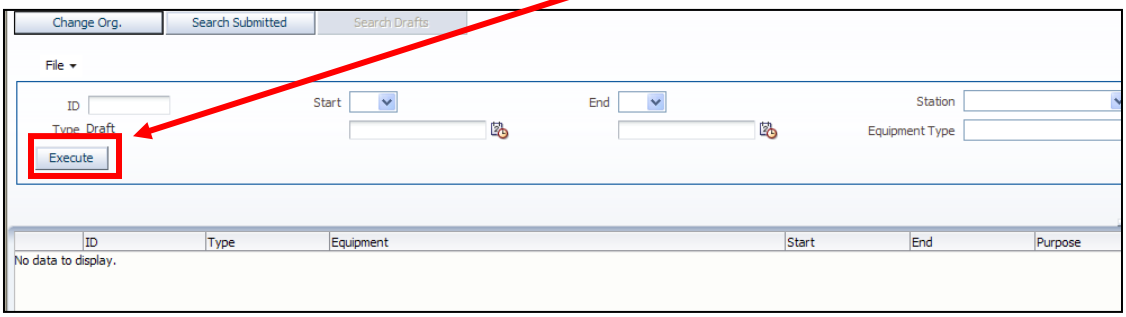
A listing of stations where the selected organization has equipment will appear when you click in this box. Select the station or stations you are searching.

Equipment Type

A list of the various types of equipment available at the selected station will appear when you click in the box. Select equipment to further narrow your search. You may select more than one.

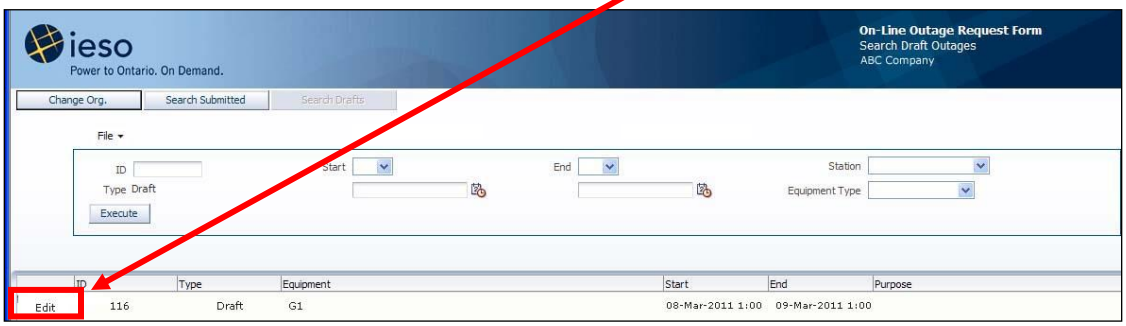
Step Three

When you have entered your desired search parameters, click on **Execute** to run your search. Retrieval is limited to 250 results.



Step Four

Select the outage you want to view or edit by clicking the **Edit** button.



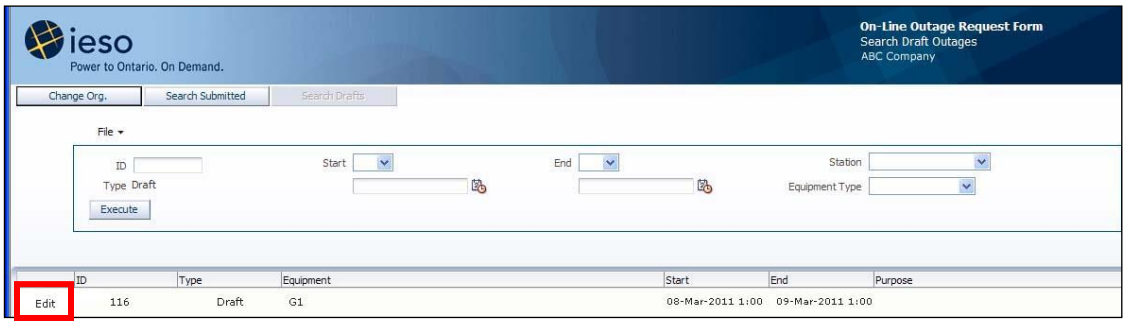
9. Creating a New Draft Outage by Copying an Existing Draft Outage

It is possible to create a new draft Outage Submission by copying and updating the information contained in an existing draft Outage. This time-saving step is available by first using the **Search Drafts** button to locate the outage you want to copy and then clicking on **Copy to Draft** under **File**.

Step One

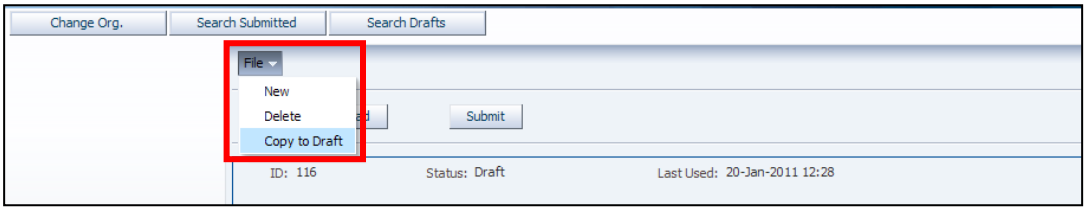
Follow the steps in Section 8, '**Searching for Draft Outage Data**' to locate the outage you would like to copy.

Click **Edit** next to the outage to retrieve it.

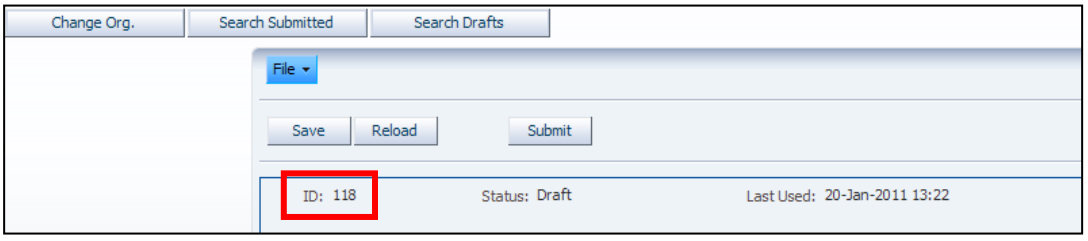


Step Two

After you have retrieved the draft outage you would like to copy, click on **File** and select **Copy to Draft** in the drop-down menu.



The **ID** Number will automatically change, indicating that this is a new draft, ready to be modified as required:



10. Edit Submitted Outage Data

Step One

Search for the outage request you wish to edit by following the instructions in Section 6, '**Searching for Submitted Outage Data**.' Click **Edit** next to the outage you would like to modify.

Step Two

Make the necessary changes to the outage data.

Step Three

If you want the outage request to remain in **Submitted** status, click **Save**. After the confirmation box appears and you have clicked **OK**, click on **Reload** to view any change in status.

11. Edit Draft Outage Data

Step One

Search for the outage request you wish to edit by following the instructions in Section 7 **'Searching for Draft Outage Data,'** above. Click **Edit** next to the outage you would like to modify.

Step Two

Make the necessary changes to the outage data.

Step Three

If you want the outage request to remain in **Draft** form, click **Save**.

If you are ready to submit your outage to the IESO, click **Submit** if requesting 3-day advance approval, or click **Submit with Request for Pre-Approval** if requesting pre-approval (1-day advance approval)**.** Remember that if you selected the box **Request Pre-Approval on Submission** on the draft form, the outage will be requested for pre-approval (1-day advance approval) at the same time that it is submitted.

If you did not select the box **Request Pre-Approval on Submission** and you submit the Outage Request, but your intent was to submit the Outage Request with a request for pre-approval (1-day advance approval), you will have to search for it later using the instructions in Section 6 '**Searching for Submitted Outage Data**,' above and submit the outage using the **Submit with Request for Pre-Approval** button when you are prepared to do so. Market participants requesting pre-approval (1-day advance approval) must ensure that their outage request meets prescribed criteria that help ensure the planned outage has a relatively low impact to the IESO-controlled grid. The prescribed criteria can be found in *Market Manual 7.3, Appendix B*.

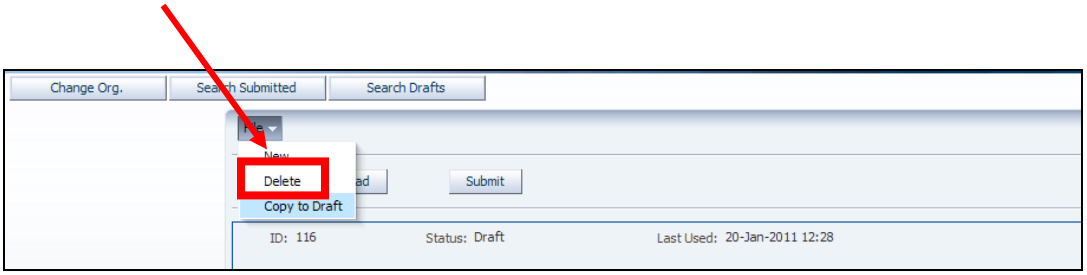
To Delete a Draft Outage

To delete a draft entry from the database, search for the outage request you want to delete by following the instructions in Section 8, '**Searching for Draft Outage Data**'.

Click **Edit** next to the outage you would like to modify to open it.

Click on **File.**

Click on **Delete** to remove the entry.



12. Cancel an Outage Data Submission

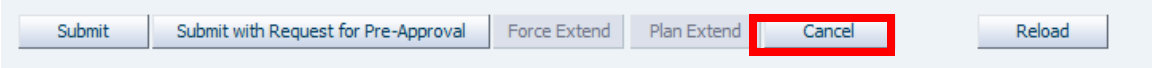
Step One

Please note that you cannot cancel a draft outage.

To cancel an outage request that you have submitted, first search for the outage request by following the instructions in Section 6 **'Searching for Submitted Outage Data'**.

Step Two

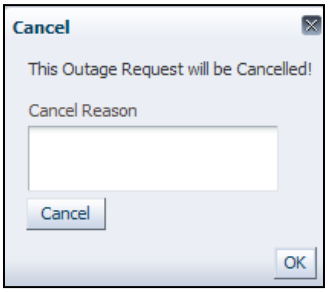
When you have opened the desired outage, you can cancel it by clicking **Cancel** at the top or bottom of the page.



Step Three

A pop-up will appear, in which you must enter a reason for the cancellation.

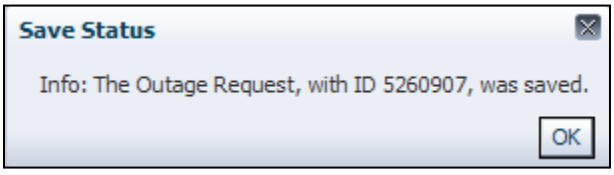
Click **OK** to complete the cancellation. Click **Cancel** to return to the entry.



Step Four

A pop-up will tell you if the change in status was successfully saved.

Press **OK**.



13. Monitoring Your Outage Request

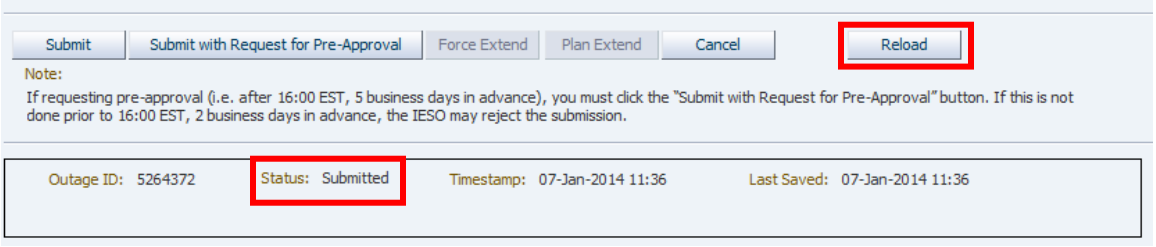
You must continue to monitor a submitted outage request for any updates until the outage is completed.

Step One

Search for the outage request you wish to review by following the instructions in Section 6, **'Searching for Submitted Outage Data'**.

Step Two

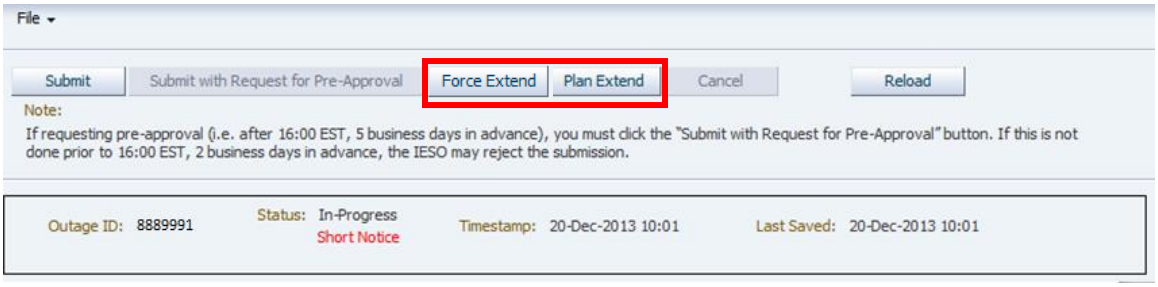
After you have selected the outage you want to monitor, click **Reload** at the top of the outage request to update the outage information.


Submit
Submit with Request for Pre-Approval
Force Extend
Plan Extend
Cancel
Reload
Note:
If requesting pre-approval (i.e. after 16:00 EST, 5 business days in advance), you must click the "Submit with Request for Pre-Approval" button. If this is not done prior to 16:00 EST, 2 business days in advance, the IESO may reject the submission.
Outage ID: 5264372
Status: Submitted
Timestamp: 07-Jan-2014 11:36
Last Saved: 07-Jan-2014 11:36

Monitoring your request keeps you updated on the status of your outage request (i.e. **Advance Approved, In-Progress, Rejected, Revoked**, etc). You will also be able to view any comments the IESO has provided for the outage (for example, any further actions required by the IESO, concerns/limits that may have to be monitored, reasons for an outage being given **Rejected** status, etc.).

14. Outage Extensions

An **'In-Progress'** status is assigned to your outage once it has received final approval from the IESO Control Room. At that time, the **Force Extend** key and the **Plan Extend** key become available.


File
Submit
Submit with Request for Pre-Approval
Force Extend
Plan Extend
Cancel
Reload
Note:
If requesting pre-approval (i.e. after 16:00 EST, 5 business days in advance), you must click the "Submit with Request for Pre-Approval" button. If this is not done prior to 16:00 EST, 2 business days in advance, the IESO may reject the submission.
Outage ID: 8889991
Status: In-Progress
Short Notice
Timestamp: 20-Dec-2013 10:01
Last Saved: 20-Dec-2013 10:01

If you must extend an outage as a result of equipment being forced from service during the period of the outage, click on **Force Extend**. If you had not previously designated the outage as **Forced** under **Type,** you will be prompted to create a new outage request.

If you want to extend an outage for any reason other than that equipment is being forced from service, select **Plan Extend**. You will be prompted to input a new **End Date/Time** for the outage. Doing so will create a new outage request with the new **End Date/Time**. This new outage will have a **Start Date/ Time** that is the same as the **End Date/Time** of the original outage request.

Planned Outages and extensions that are submitted after the deadlines for 3 day advanced approval and if eligible, for pre-approval (1-day advance approval) will be rejected by the IESO unless allowances for scheduling flexibility apply. See Market Manual 7.3: Outage Management for details.

To facilitate tracking of outages, a note will be created in the **MP Comments** section for the new outage request. This note will indicate that the outage is an extension of the original outage request. For example: "Extension to outage #1234567".

To change the end time on a **Forced-In-Progress** outage request, type in a new time in the **Planned End** box and click **Force Extend**.

15. Printing Reports

Outage information entered in the Outage Management community can be printed as a summary table of your search results or as a detailed record of a particular outage.

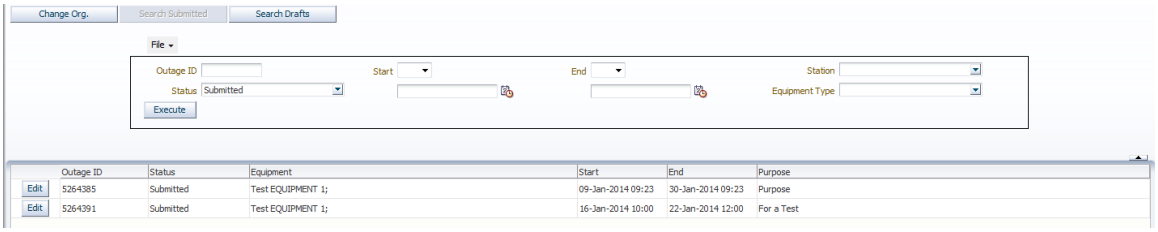
To begin the process, conduct a search for the outage or outages you would like to print, using the **Search Submitted** or **Search Drafts** procedure. You can access up to 250 results per search. These procedures are explained in either Section 6, '**Searching for Submitted Outage Data',** or Section 8, '**Searching for Draft Outage Data'**. An example of a Search Submitted query for all outages with the status, "Submitted" has been included below.

Step 1: Search for Outages

To begin, click on **Search Submitted**, as in the example below (or use **Search Drafts**):

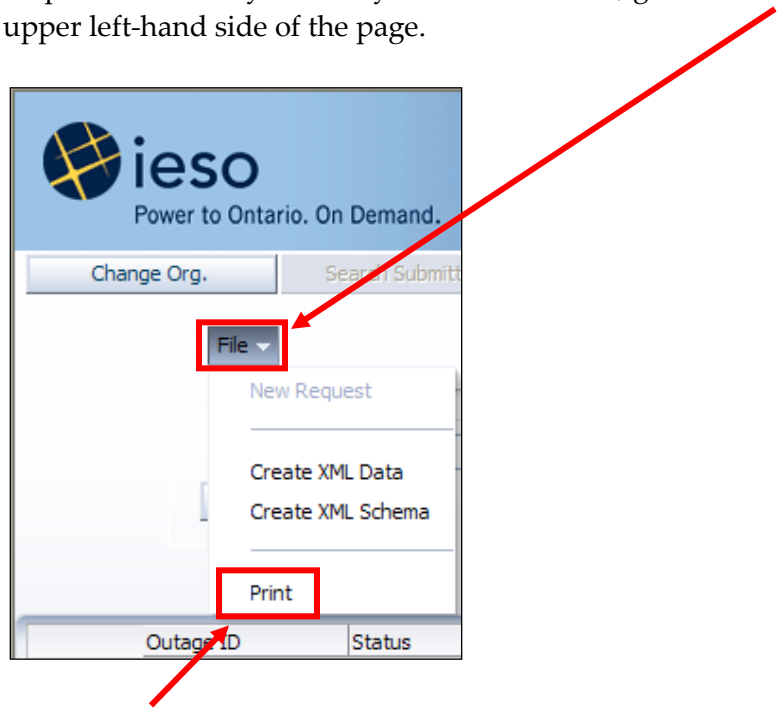
The **Search Submitted Outages** screen will appear. Use your preferred search parameters (in this example, the **Status** 'Submitted' has been selected).

Click on **Execute** to see the results of your search.



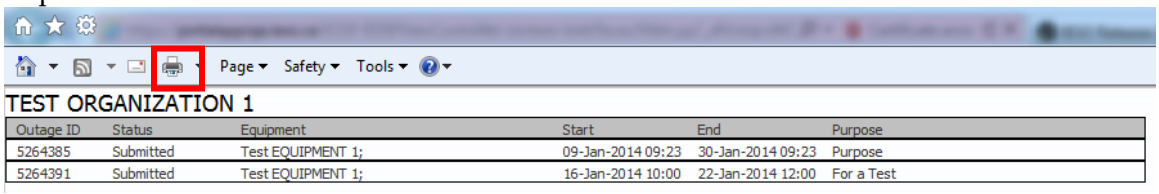
Step 2: Print a Summary Table

To print a summary table of your search results, go to the **File** drop down menu on the upper left-hand side of the page.



Click on **Print**.

A pop-up window will appear with a formatted version of the information you have requested.

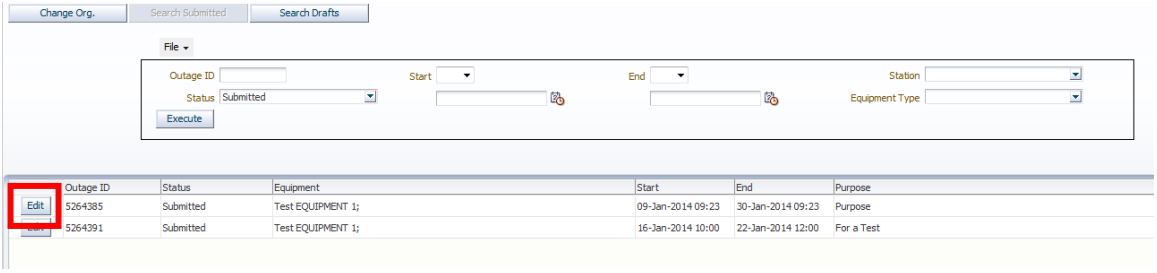

Page
Safety
Tools
TEST ORGANIZATION 1
Outage ID Status Equipment Start End Purpose
5264385 Submitted Test EQUIPMENT 1; 09-Jan-2014 09:23 30-Jan-2014 09:23 Purpose
5264391 Submitted Test EQUIPMENT 1; 16-Jan-2014 10:00 22-Jan-2014 12:00 For a Test

Click on the **Print** icon to continue printing according to your usual print procedure.

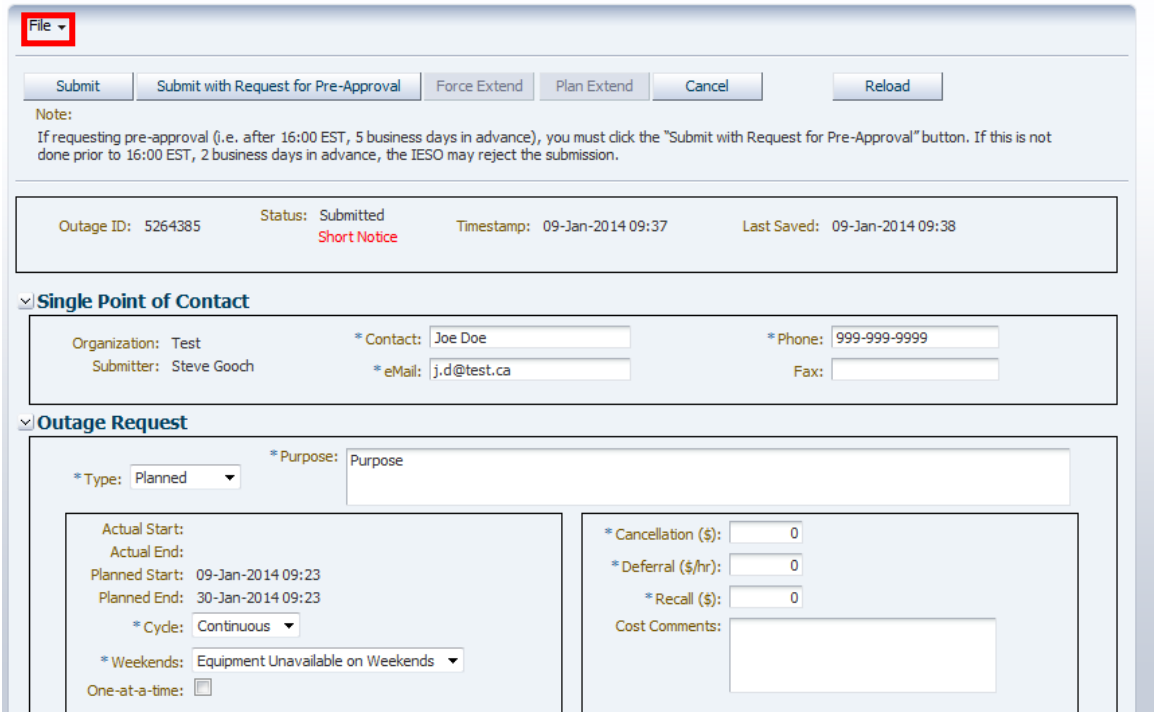
Tip: You can use **Select All** (right-click on your mouse to see a pop-up menu with this option) or highlight specific text, then click **Copy.** In another document, such as an Excel spreadsheet, you can now click **Paste** to place the copied summary text on the page.

Step 3: Print Outage Details

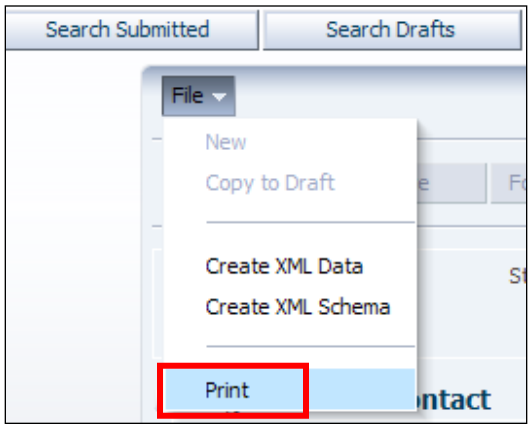
To print the details of a particular outage in a one-page, formatted document, first choose the outage you would like to print. When you have executed your search, click on the **Edit** button to open the outage you would like to print.



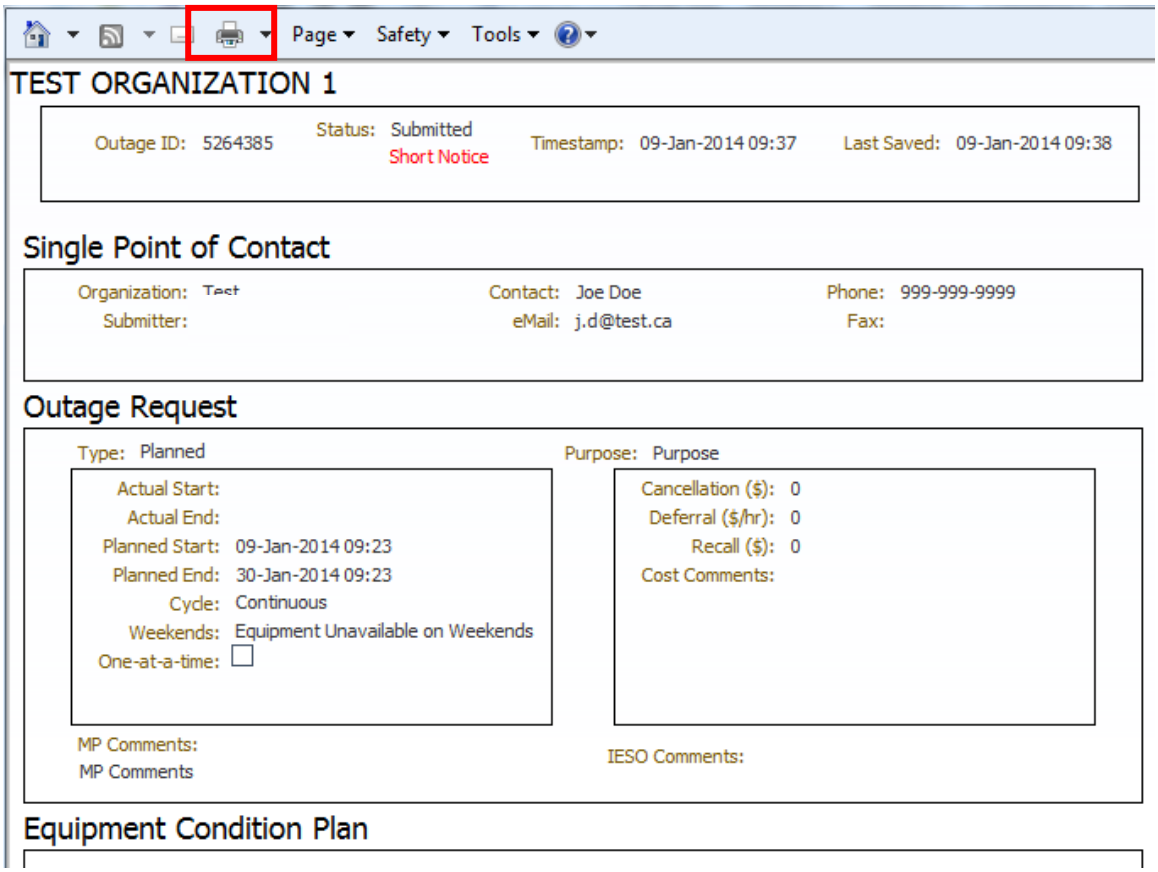
The **Edit Submitted Outage** screen will appear.



Click on the **File** drop-down menu. Select **Print** to open a formatted version of the outage report.



When the formatted outage appears, click on the Print icon to continue printing according to your usual print procedure.



Tip: If you have the ability to create PDF documents from HTML pages, you can use this function to make an electronic copy of your outage after creating the formatted page.

16. Creating XML Reports

Outage information entered in the Outage Management community is available to you in XML format. This data can be retrieved for use in your own custom-designed Stylesheet, or you can choose to use the generic IESO Stylesheet provided on the IESO Training site.

A report can be generated from any search performed through the 'Search Submitted' function (a search will return a maximum of 250 results), which is described in Section 6, '**Searching for Submitted Outage Data**'.

There are three main steps involved in retrieving and viewing XML data:

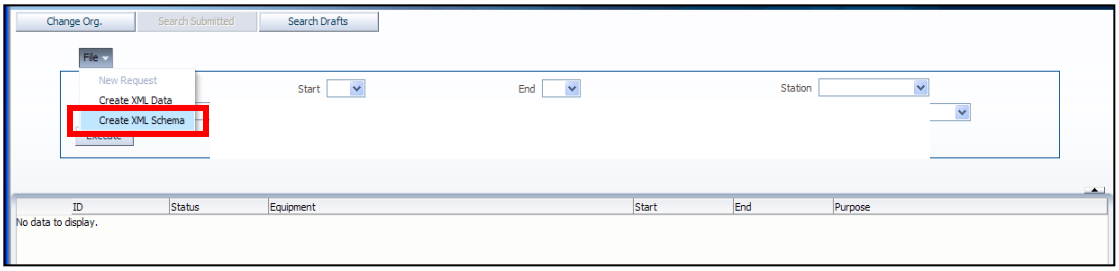
1. Download and save the XML Schema (this file, and all Outage Report XML files should be saved in the same location).
2. Create an XML data file of your **Search Submitted** query results.
3. Apply a Stylesheet to the XML data file.

Step 1: Download and Save the XML Schema

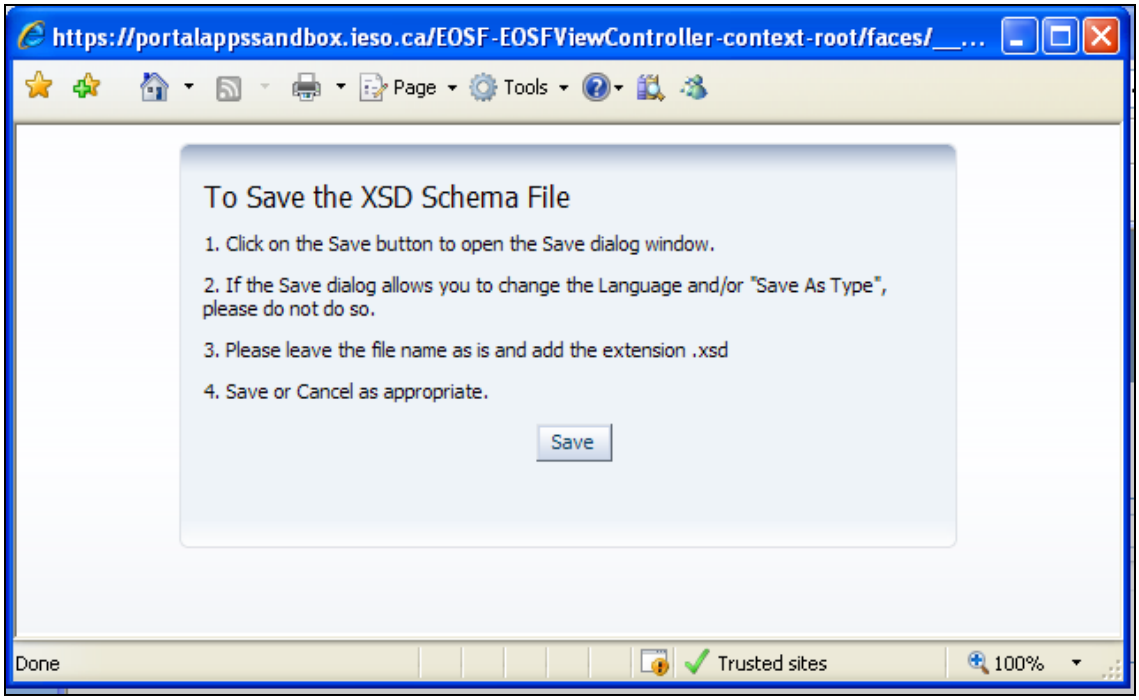
Before creating your first XML data file using **Search Submitted**, it is necessary to download and save the XML Schema for the data. This only needs to be done once. Save this file and all Outage Report XML files in the same location.

To begin, click on **Search Submitted**:

Click on **File**, and select **Create XML Schema** from the drop-down menu.



A pop-up window will appear with instructions:

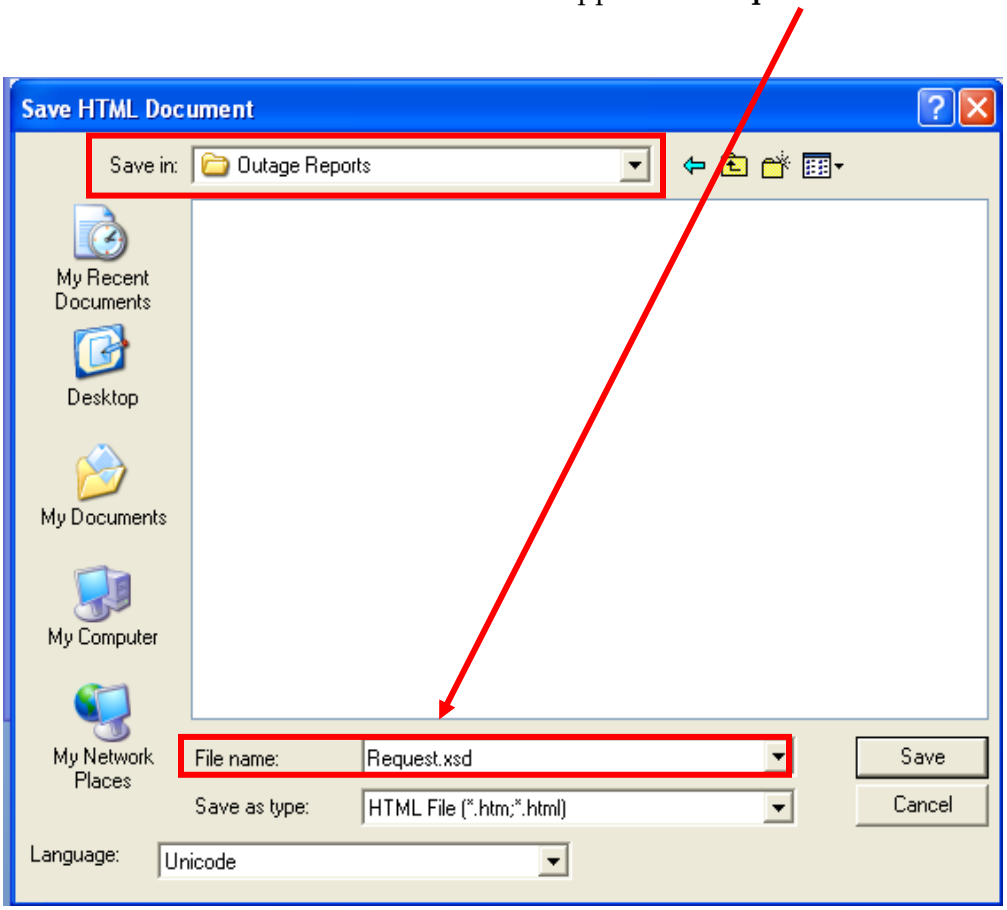

https://portalappssandbox.ieso.ca/EOSF-EOSFViewController-context-root/faces/__...
Page
Tools
To Save the XSD Schema File
1. Click on the Save button to open the Save dialog window.
2. If the Save dialog allows you to change the Language and/or "Save As Type", please do not do so.
3. Please leave the file name as is and add the extension .xsd
4. Save or Cancel as appropriate.
Save
Done
Trusted sites
100%

Read the instructions and click **Save**.

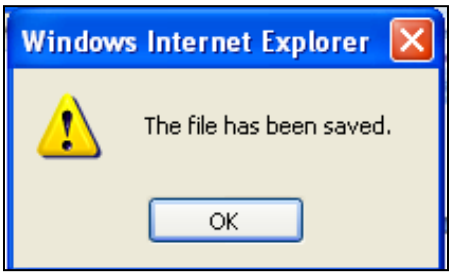
The **Save HTML Document** pop-up will appear.

In the **Save In** box, select the location where you would like to store your outage data. In this example, it is a folder named "Outage Reports".

In the **File name** box, you will see the word "Request". Without changing the name, add the file extension **.xsd** so that the File name appears as **Request.xsd**.



Click **Save**. A pop-up box will appear to confirm that your file has been saved. Click **OK**.

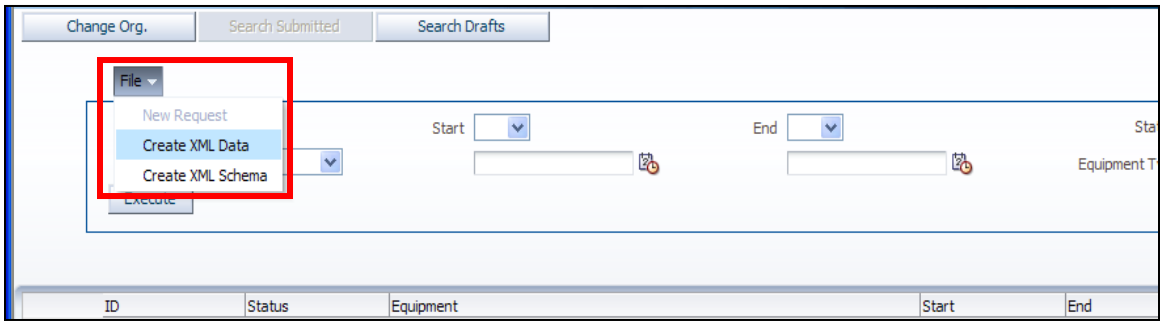


You will then return to the To Save the XML Schema File pop-up. Close the box to continue.

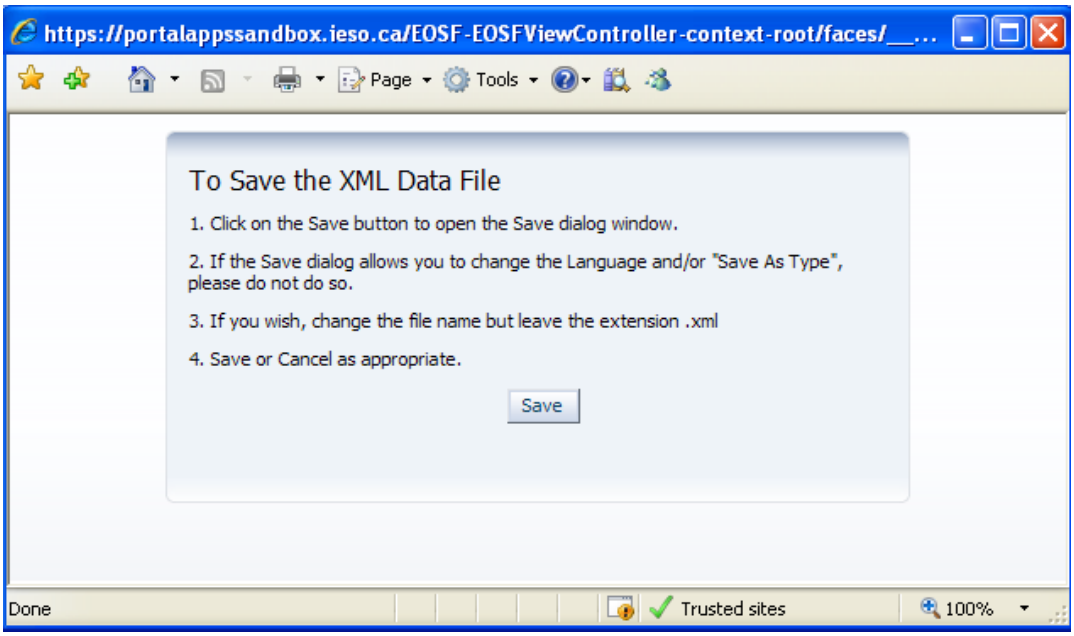
Step 2: Create an XML data file of your Search Submitted query results.

Follow the steps in Section 6, **'Searching for Submitted Outage Data'** to retrieve the information you would like to include in your report (up to a limit of 250 search results).

Once your search is complete and your results are listed on the **Search Submitted** page, click on **File** to select **Create XML Data** in the drop-down menu.



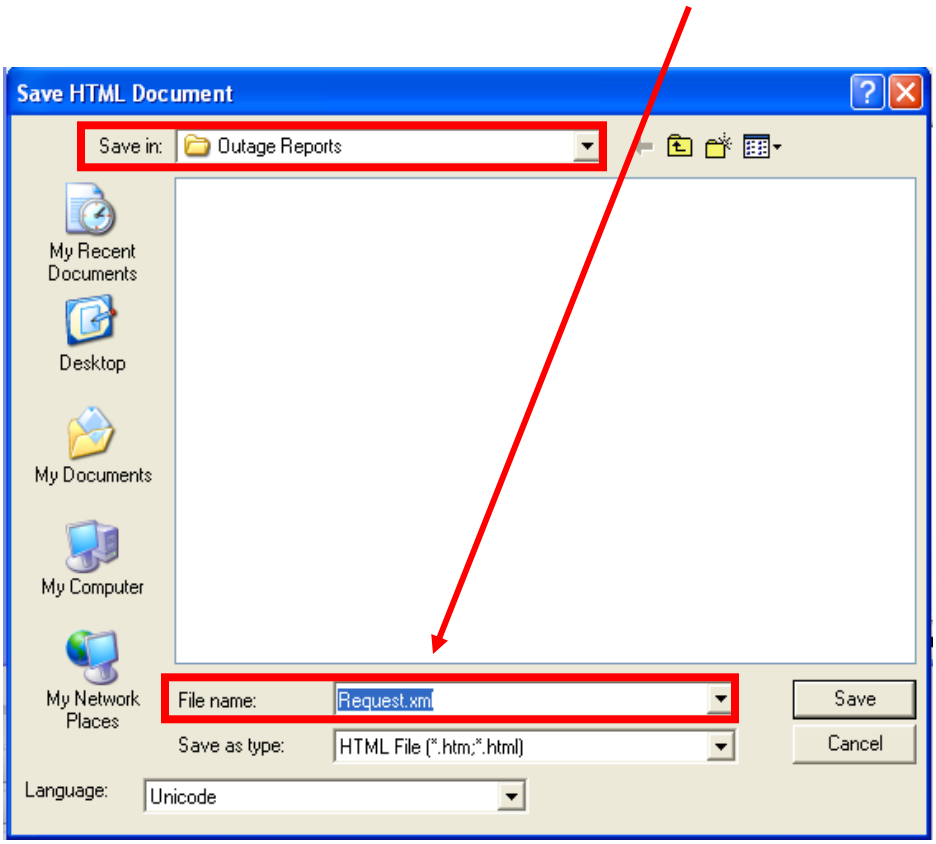
A pop-up box appears. Read the instructions and click on **Save**.


https://portalappssandbox.ieso.ca/EOSF-EOSFViewController-context-root/faces/__...
Page
Tools
To Save the XML Data File
1. Click on the Save button to open the Save dialog window.
2. If the Save dialog allows you to change the Language and/or "Save As Type", please do not do so.
3. If you wish, change the file name but leave the extension .xml
4. Save or Cancel as appropriate.
Save
Done
Trusted sites
100%

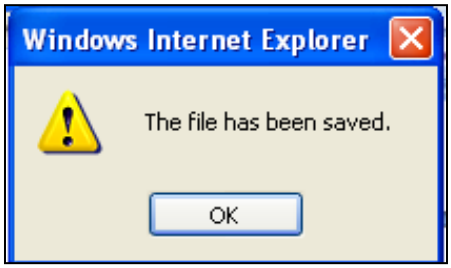
The **Save HTML Document** pop-up will appear.

In the **Save in** box, choose the same location where the XML Schema file (**Request.xsd**) is saved. In this example, the folder is called "Outage Reports".

The default file name will appear as "Request". You may change this to give the file any name you like, but be sure to include the extension .**xml** following the file name.



Click **Save**. A pop-up box will appear to confirm that the file has been saved.

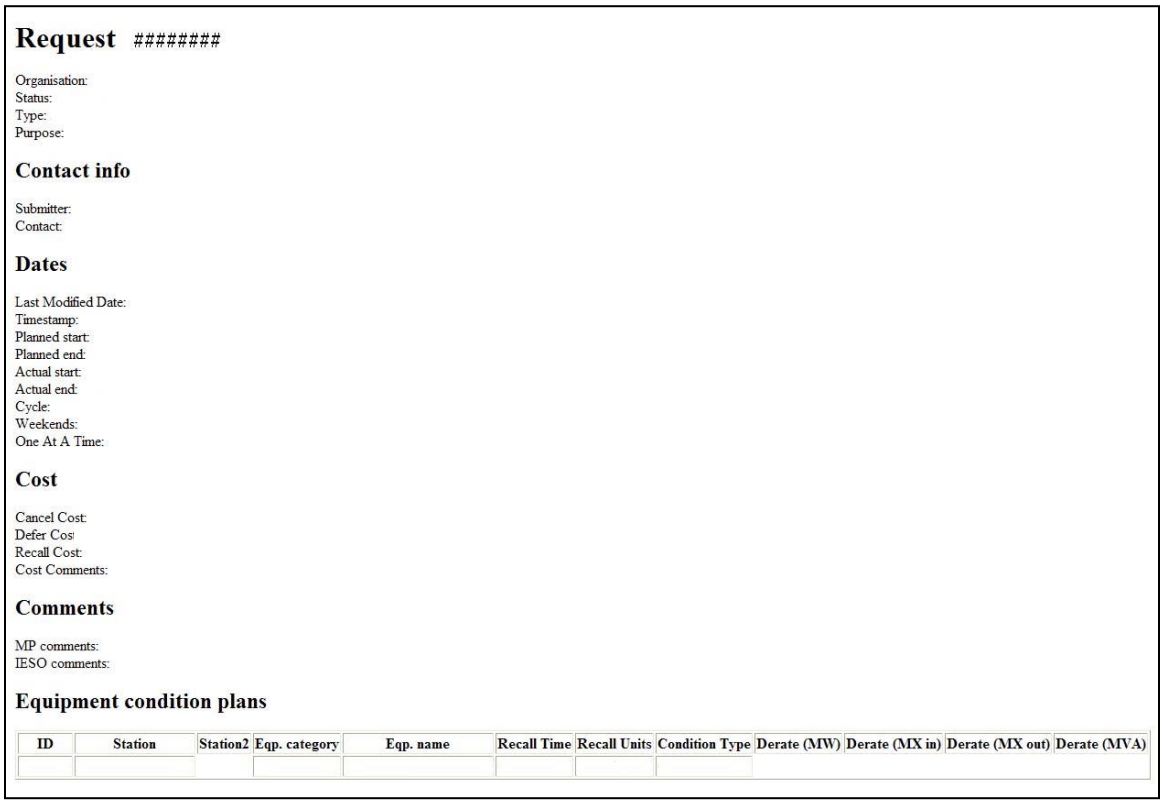


Click **OK**. You will then return to the **To Save the XML Data File** pop-up. Close the box to continue.

Step 3: Apply a Stylesheet to the XML data file.

If you do not have your own Stylesheet available, you can save the generic XML Outage Report Stylesheet in order to create an easy-to-read Outage Report from your saved XML data. The Stylesheet is available with this guide, on the IESO Training page http://www.ieso.ca/imoweb/marketplaceTraining/training_overview.asp under **Tool Training Manuals and Simulations**.

The IESO Stylesheet displays your XML data in the following format:



Request ########

Organisation:
Status:
Type:
Purpose:

Contact info

Submitter:
Contact:

Dates

Last Modified Date:
Timestamp:
Planned start:
Planned end:
Actual start:
Actual end:
Cycle:
Weekends:
One At A Time:

Cost

Cancel Cost:
Defer Cost
Recall Cost:
Cost Comments:

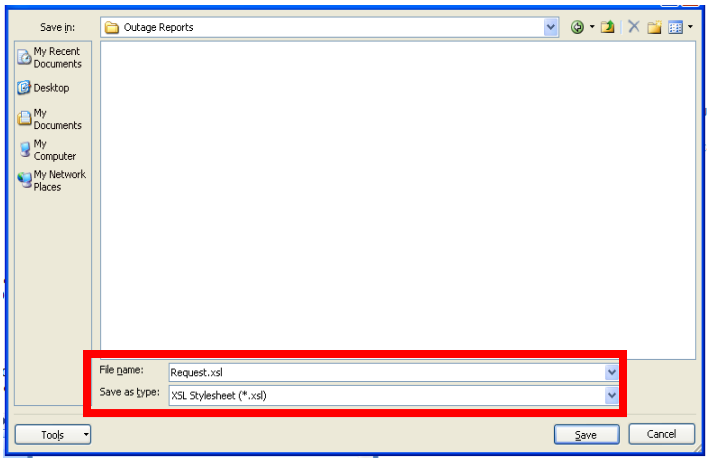
Comments

MP comments:
IESO comments:

Equipment condition plans

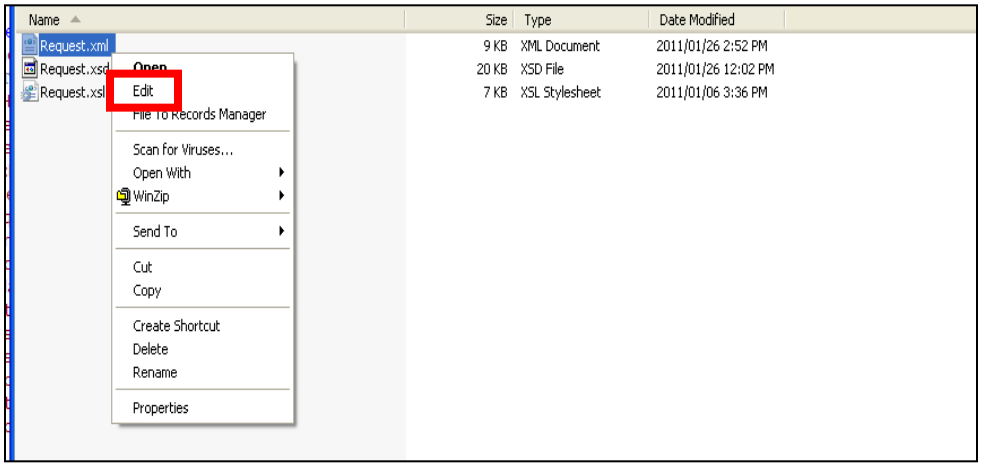
ID	Station	Station2	Eqp. category	Eqp. name	Recall Time	Recall Units	Condition Type	Derate (MW)	Derate (MX in)	Derate (MX out)	Derate (MVA)

To save the Stylesheet file, *right-click* on the link to the Stylesheet. Click on **Save Target As** in the pop-up menu. Save the file as **Request.xsl** in the same location where the XML Schema and XML data files are stored. In this example the folder name is "Outage Reports". Click **Save**.

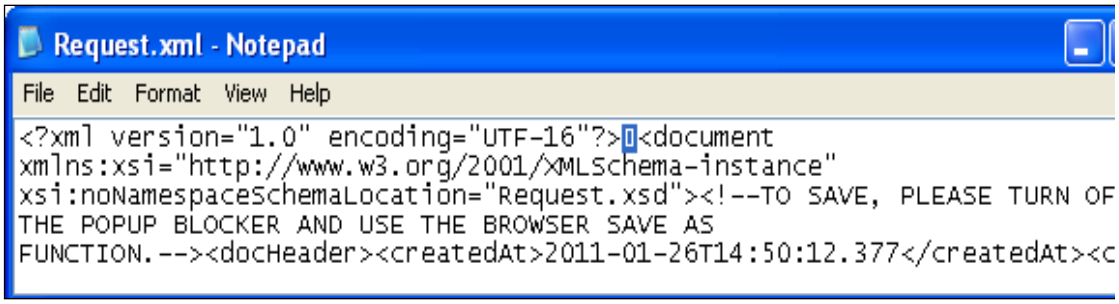


Once the Stylesheet has been saved (it is only necessary to save it to your folder one time), open the folder where you have stored the Outage XML files.

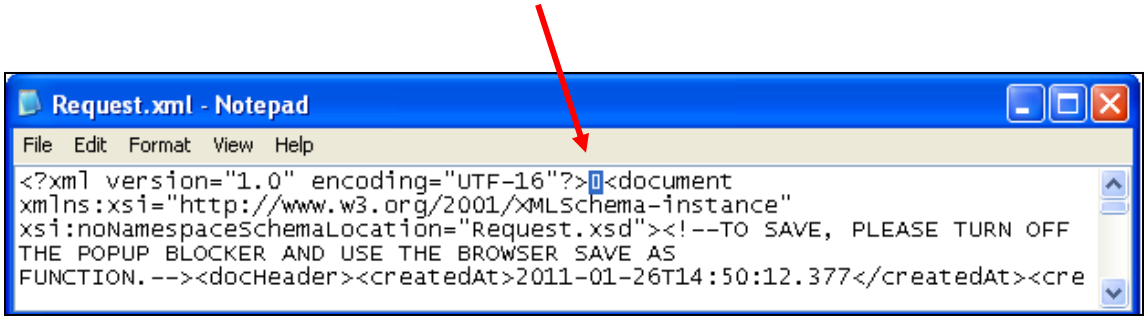
Find the XML file for the search request that you would like to use to create your report. *Right-click* on the file name to view a pop-up menu of options. Click on **Edit**.



The XML file will open in Notepad:



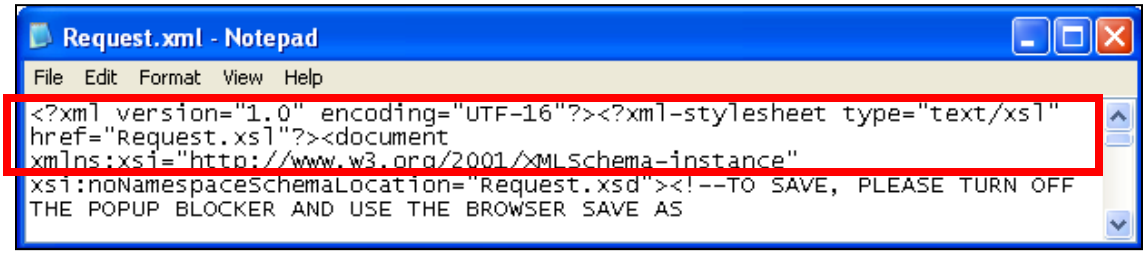
Select and highlight the rectangle character as shown:



In this space, type or paste the following string of code to replace the rectangle character, exactly as shown and without any spaces:

<?xml-stylesheet type="text/xsl" href="Request.xsl"?>

The Notepad file should now appear like this:



Under the **File** menu, click on **Save**. Close the Notepad box.

Now, when you open the saved XML data file, it will open in Internet Explorer with the Stylesheet format that was applied when you pasted in the Stylesheet code. Note that transferring the file to another user will require that they have a copy of the .xsl format Stylesheet that you are using.

17. Logging off

Step One

To end your session, ensure that your current outage has been saved.

If you are working on a Drafts Outage, click **Save**.

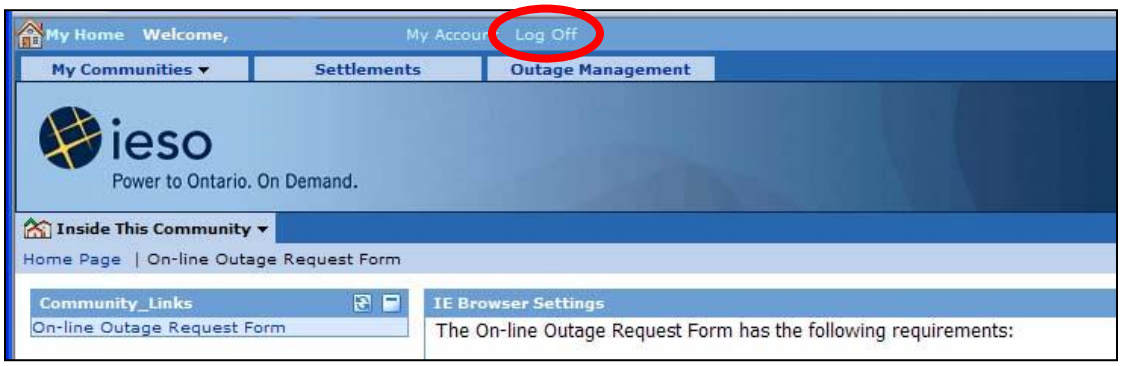
If you are editing a Submitted Outage, click **Save**. Once the confirmation box appears and you have clicked **OK**, click on **Reload** to view any changes in **Status**.

Step Two

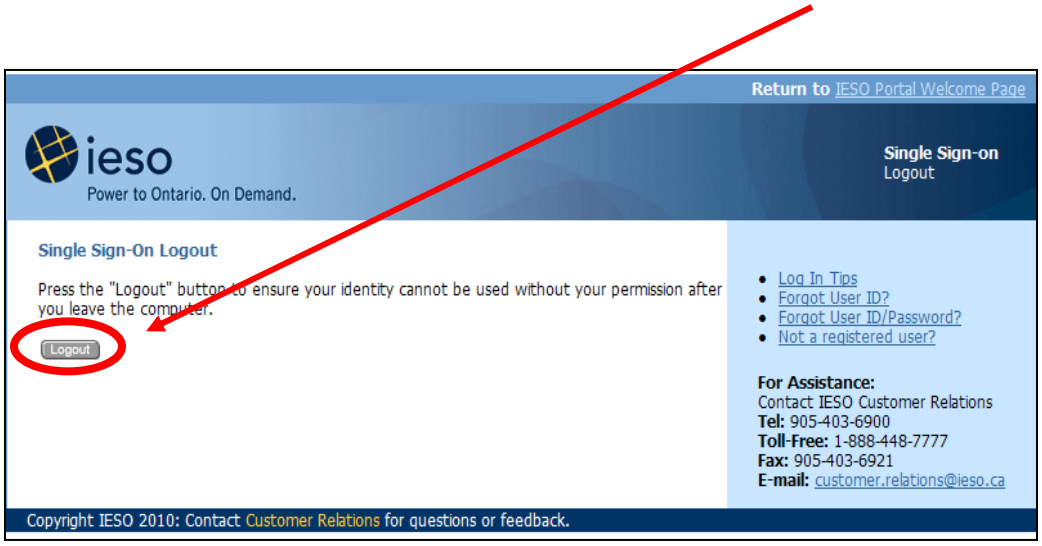
Close the **Online Outage Request Form** page.

Step Three

Log off of **Sandbox Portal** by clicking on **Log Off**.



You will be taken to the **Single Sign-on Logout** page. Click **Logout**.



18. Troubleshooting

If you are having trouble submitting or updating your outage data, please contact IESO Customer Relations for assistance at:

Tel: (905) 403-6900
Toll Free: 1-888-448-7777
Fax: (905) 403-6921

customer.relations@ieso.ca